Antagonisms
in the EU's neighbourhood

Geopolitical Ambitions
in the Black Sea and Caspian Region

Bertelsmann**Stiftung**

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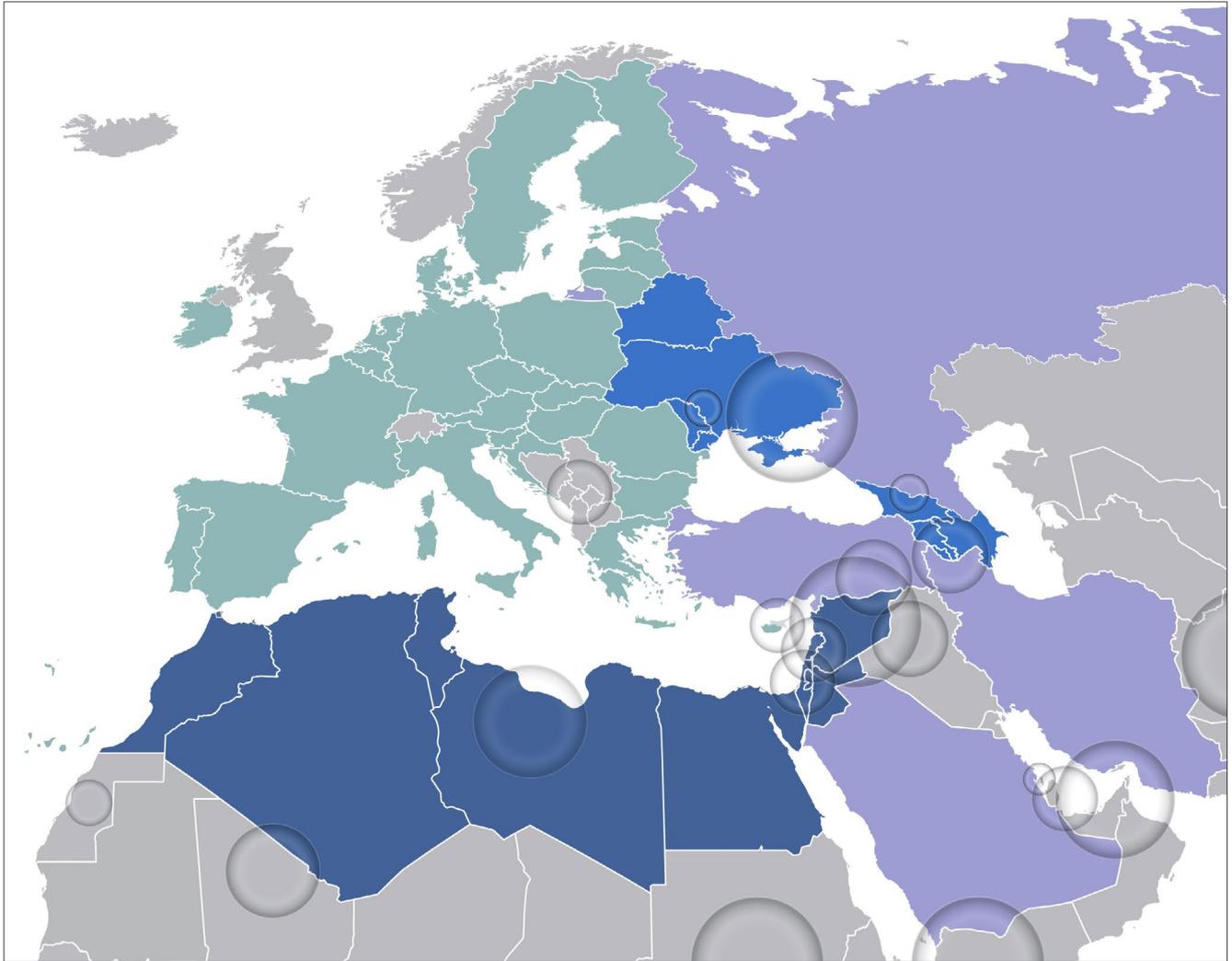
Neighbors of the neighbors

- 🟢 **EU 27**

- 🟣 **Influential neighboring states** Russia, Turkey, Iran, Saudi Arabia

- 🔵 **Eastern Partnership** Armenia, Azerbaijan, Belarus, Georgia, Republic of Moldova, Ukraine

- 🔵 **Southern Neighborhood** Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Syria, Tunisia, Westbank including East-Jerusalem und Gaza

- ⚪ **Conflicts of values and interests**

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The Key States project initiative – an introduction

This policy paper titled "Geopolitical Ambitions in the Black Sea and Caspian Region" deals with a region in the eastern neighborhood of the European Union, which – largely outside the view of the general public – has increasingly become a zone of conflict.

Seen from Brussels, the region lies a comfortable distance away. Yet two EU member states and three NATO partners border the Black Sea. Their economic and security interests are directly affected by developments there which, in turn, has an impact on Europe as a whole.

In its quest to construct a "ring of friends" along its own borders, the EU is learning that its own scope of action has narrowed. Four states – Russia, Turkey, Iran and Saudi Arabia – are playing an increasingly active role in this region. To varying degrees, and with varying levels of openness, these four large states are exerting influence within the countries neighboring the European Union, which are also their own neighbors. From the European point of view, these countries' power to influence events in this shared neighborhood has certainly earned them the label of "key states."

While Brussels' policies have supported transformation in neighboring countries that targets political stability, democracy and a market-oriented economy, these regional powers are pursuing other goals. Hopes for a deepening of cooperation efforts in the Black Sea region, formulated 10 years ago in the Vision 2020 Report, have not been fulfilled. If it wishes to have a long-term impact and open up opportunities for new courses of action, the EU should review and strategically reorient its neighborhood and external policies, in part by deepening its understanding of the interests, motives and interdependencies of the key states.

To this end, the Bertelsmann Stiftung's Europe's Future program has established a strategy group composed of independent experts within its broader Strategies for the EU Neighbourhood project.

Members of this group include:

- Christian-P. Hanelt, expert on the Middle East, Bertelsmann Stiftung, Berlin;
- Wilfried Jilge, expert on Eastern Europe, Associate Fellow, German Council on Foreign Relations, Berlin;
- Dr. Christian Koch, expert on Arab Gulf states, Bussola Institute, Brussels;
- Miriam Kosmehl, expert on Eastern Europe, Bertelsmann Stiftung, Berlin;
- Adnan Tabatabai, Iran expert, Center for Applied Research in Partnership with the Orient, Bonn;
- Prof. Dr. Erdal Yalcin, expert on economics and Turkey, HTWG Konstanz – University of Applied Sciences, Konstanz.

Since the release of its first overview paper, the group's joint work has focused on individual regions of the EU neighborhood.

The EU, Russia, Turkey, Iran and Saudi Arabia struggle for influence in their common neighbourhood (August 2018)

Overcoming strategic deficits with regard to Syria – How the EU can demonstrate resolve and respond to the interests of regional powers (May 2019)

We are now turning to the Black Sea and Caspian region, because the developments there are having a direct effect on Europe. The countries and regions are closely intertwined. Between the two seas lies the Caucasus, the southern land bridge of which has always been a transit region of supra-regional significance. In addition, waterways and shipping lanes have become increasingly important, for instance in connecting Europe and Asia. The region's gas flows and pipelines are undergoing changes as a consequence of the conflict between Russia and Ukraine, with spill-over effects being felt as far as southeastern Europe. Russia is expanding its presence in the region. Turkey is also a cause for concern. The country is of enormous significance to Europe, but it remains unclear whether Ankara is still a reliable ally. In addition, the interests of China and the Central Asian states play a role.

For these reasons, the strategy group has asked

- Bernhard Bartsch, China and Asia-Pacific expert, Bertelsmann Stiftung, Berlin;
- Dr. Kadri Tastan, senior fellow, German Marshall Fund, Brussels; and
- Dr. Birgit Wetzel, author and expert on the subjects of energy, the Caucasus and Central Asia, Hamburg and Berlin

to contribute their expertise to this publication.

In addition, we would like to thank the following regional experts for their invaluable input:

- Paata Gaprindashvili, director of the think tank Georgia's Reforms Associates (GRASS), Tbilisi;
- Mykhailo Gonchar, founder and president, The Centre for Global Studies "Strategy XXI," Kyiv;
- Andrii Klymenko, Crimea studies expert, editor-in-chief of the BlackSeaNews online publication, head of the Monitoring Group of the Black Sea Institute of Strategic Studies;
- Anton Korynevych, permanent representative of the president of Ukraine in the Autonomous Republic of Crimea;

- Professor Joachim Krause, director of the Institute for Security Policy at the University of Kiel;
- Professor Otto Luchterhandt, professor emeritus for public law and Eastern legal studies, University of Hamburg;
- Roman Martinovsky, legal expert, Regional Center for Human Rights, Kyiv;
- Oleksandra Matviychuk, attorney, chairwoman of the Center for Civil Liberties, Kyiv;
- Simon Papuashvili, program director, International Partnership for Human Rights, Brussels;
- Professor Alexander Proelß, chair of international law of the sea and international environmental law, public international law and public law at the University of Hamburg;
- Laurent Ruseckas, executive director of IHS Markit, London;
- Mykhailo Samus, deputy director, Center for Army, Conversion and Disarmament Studies, Kyiv;
- Hanna Shelest, editor-in-chief of the journal UA: Ukraine Analytica;
- Valentin Schatz, Institute for the Law of the Sea and for Maritime Law, Faculty of Law, University of Hamburg;
- Vessela Tcherneva, head of the Sofia office of the European Council on Foreign Relations;
- Bohdan Ustymenko, lawyer and expert on the law of the sea and security in the Black Sea, first deputy director of the Ukraine State Institution of Hydrography (through 2 December 2019);
- Martin Vladimirov and Ruslan Stefanov, Center for the Study of Democracy, Sofia; and
- Klaus Wittmann, brigadier general (ret.), senior fellow, Aspen Institute Deutschland.

The present paper should be regarded as an appeal to reflect on possible strategies before developments in the region grow into an acute conflict. By identifying challenges and risks at an early stage, the strategy group wants to provide policymakers with the impetus to develop solutions, strengthen preventive resilience and defuse crises through timely action. The contributions presented here do not necessarily reflect the views of the institutions with which the individual authors are associated.

Overview map of the Black Sea and Caspian region

Legend:
- European Union
- Southern and eastern European neighborhood countries
- Key states and regional powers

RUSSIA

KAZAKHSTAN

UZBEKISTAN

TURKMENISTAN

CHINA

Sea of Azov

Black Sea

Caspian Sea

TURKEY

IRAN

Persian Gulf

Strait of Hormuz

SAUDI ARABIA

Istanbul Canal

Bosporus

Marmara Sea

Dardanelles

TURKEY

Last update: June 30, 2020

1. Russia's influence in the greater Black and Caspian Sea region

1.1 The region and its actors

The Black Sea region and the region around the Caspian Sea together form a larger and important region within the European Union's eastern neighborhood. They also constitute a strategically important corridor for trade, transport and energy routes between Asia and Europe.

In recent years, the Black Sea has become a dangerous conflict zone. Its neighboring sea, the Sea of Azov, along with the nearby waterways and straits providing access to important waters, have also gained increasing importance.

The increased potential for conflict in the region was made clear – at the latest – by the Russian Federation's annexation of Crimea, which was a violation of international law. For Russia, Crimea forms the heartland of the so-called Russian world and is therefore seen as belonging to its sphere of influence. Moscow is pursuing an intertwined set of geopolitical, economic and energy-policy interests in the region. Russian energy policy, for example, is serving military-strategy and security-policy functions as well as commercial interests.

In the Black Sea and the Sea of Azov, Moscow is step-by-step seeking to establish a dominant position by, for example, trying to take control of key marine areas, shipping routes and important waterways (straits). In doing so, Moscow is knowingly in breach of international public law, undermining the spirit of the international law of the sea, not appropriately taking into consideration the sovereign rights of other littoral states, and contriving justifications for its actions through the use of grey areas in the law.

This policy is focused on Ukraine, which is of fundamental strategic importance due to its exposed position on the Black Sea and the Sea of Azov. This is particularly true of the Crimean Peninsula.

One objective of Russian policy is to strengthen the entire Russian southern flank on the Black and Caspian seas. In this conflict with Ukraine, the Kremlin is experimenting with an approach that it applies to other regions of the EU neighborhood as well.

Russia is seeking to intimidate Ukraine militarily and, in so doing, to gain sole control of the strategically important Kerch Strait waterway and the Sea of Azov. By accomplishing this, Moscow obtains freedom of movement not only for the Russian Black Sea Fleet stationed in Crimea, but also for its Caspian Fleet, which reaches the Sea of Azov and the Black Sea through the Volga-Don Canal. The Kremlin thus achieves its most important objectives even without implementing an occasionally considered plan deemed currently infeasible, to create a Russian-dominated land bridge ("New Russia") along the north coast of the Black Sea, from Mariupol to Odesa.

Russia is strengthening its Black Sea Fleet because it is seen as having a critical role in the confrontation with the United States in the Mediterranean Sea. At the same time, Moscow is expanding its control in an EU neighborhood region that Brussels has neglected and in which Moscow is exploiting the opportunity to act as an "arbitrator" in conflicts that it itself has helped generate.

Russia is not the only regional power seeking influence in the region. Turkey in particular is pursuing its interests on and between the three seas. The same is true of China with its Belt and Road Initiative (BRI, or Silk Road Initiative), and to a lesser extent of Saudi Arabia and Iran. In any case, Russia remains the most powerful state in the region. The behavior of the other regional powers, depending on the degree of participation or restraint, amplifies the impact of Russian policy.

1.2 Elements of Russian behavior in the conflict with Ukraine – A systematic policy of fait accompli

1.2.1 Military occupation of Crimea with regular Russian armed forces units

The incorporation of Crimea into the Russian Federation is an annexation contrary to international law. It was immediately preceded by a violation of the Charter of the United Nations' general prohibition on aggression, "insofar as Russia … occupied Crimea with military force, and established a puppet regime there" (Luchterhandt 2014: 172). There is broad agreement in the international community regarding the facts of the annexation and its violation of international law. It later enabled Russia to obtain full control of the peninsula, thus satisfying the first requirement for establishing control over the Kerch Strait, without there being any legal basis for this outcome. Because Russia considers Crimea and thus the coasts on both sides of the strait to be Russian, it refers to the strait as an inland Russian waterway, and thus as part of its sovereign territory (Luchterhandt 2019).

1.2.2 Occupation of Ukraine's Exclusive Economic Zone (EEZ)

With the international community taking little notice, Russia occupied the Ukrainian gas platforms between the coast of Crimea and the coast off Odesa in early 2014. These platforms lie in Ukraine's Exclusive Economic Zone (EEZ). Some, such as the Odesa gas fields, are even closer to the Odesa coast than to the Crimea coast (Klymenko 2020). This creates the precondition for the extension of Russian control into the northwestern part of the Black Sea. Therefore, in this case, we can speak of a de facto expansion of the occupation into Ukraine's EEZ. The question of whether maritime areas can be "occupied" in the legal sense is a contested one. The critical aspect of this case is that Russia's violations of Ukraine's functionally limited rights in its EEZ – through the occupation and appropriation of the platforms, as well as through the resulting economic harm to Ukraine – have been significant. In addition, security conditions in the Black Sea's northwest have deteriorated for Ukraine, as Russia has equipped the platforms with militarily usable reconnaissance systems and is guarding them with Russian forces. This helps explain the opinion within the international law community that regards the application of the term "occupation" to maritime areas as justified in the legal sense (Interview with Otto Luchterhandt, May 2020).

1.2.3 Building a bridge between Crimea and Russia

As early as March 2014, Russian Prime Minister Dmitry Medvedev had already commissioned a feasibility study investigating the prospect of a Crimea bridge. Ultimately completed in May 2018, this structure now spans the Kerch-Yenikale Canal (a shipping canal in the Kerch Strait), creating a four-lane highway and two-track rail link from Crimea to the Taman Peninsula in the Russian region of Krasnodar. With this bridge, the Kremlin has created the capacity to enact a partial blockade of Ukrainian ships on the Kerch Strait. The construction of the bridge alone has already hampered ship traffic. With an at-point of passage height of 33 meters, the bridge severely restricts the passage of large ships, including certain Panamax-class types (Luchterhandt 2019: 14).

1.2.4 Oversight of shipping traffic by Russia's domestic intelligence service

The Russian domestic intelligence service, the Federal Security Service (FSB), which oversees the Russian coast guard, monitors Ukrainian and other foreign ships. In some cases, its searches of ships and interrogation of crews have blocked onward travel for days. This is expensive for ship owners; depending on the type of ship, every additional day at sea costs between $5,000 and $50,000 (Klymenko and Guchakova 2018: 11). Each blockade reinforces the negative economic effects which, in turn, leads to the loss of millions of tons of cargo for Ukraine. While nearly 4 million tons of cargo were loaded in the port of Berdyansk on the Sea of Azov in 2016, this fell to less than 2 million in 2018 (Hassel 2019). The impact on the fishery industry has been similarly negative. In addition to destabilizing Mariupol, the only industrial metropolis on the Sea

of Azov still controlled by Kyiv, as well as the hinterland in the East Ukrainian Donbas, Russia's escalation on the Kerch Strait is aimed at disrupting the Ukrainian government's efforts to rebuild a navy decimated by the Crimea annexation, initiated in 2018. In November of that year, Ukraine published its first-ever naval strategy (Sanders 2019: 174).

1.2.5   Military confrontation between the Russian coast guard and Ukrainian navy

The military confrontation between the Russian coast guard and the Ukrainian navy in November 2018 led to the boarding of Ukrainian ships with the deployment of Russian fighter jets and helicopters. The entire crews of the Ukrainian vessels were detained for nearly a year. The Russian claim of illegal intrusion into Russian territorial waters lacked any legal foundation (Jilge 2019: 50-51). To a great deal, this incident was made possible by the bridge built over the Kerch-Yenikale Canal in violation of international law, and the blockade policy this technically facilitated. Overall, the Russian-sparked military confrontation and escalation in the Sea of Azov represents a practical consequence of the Crimea occupation, initially unremarked by the international public, that extends unambiguously to the canal and the island of Tuzla to the east (Interview with Otto Luchterhandt: Juni 2020). Afterward, the imposition of economic sanctions was discussed by the European Union; however, given the event's severity, the response was weak: Eight Russian individuals (for example, members of the FSB's coast guard) who participated in the attack on the Ukrainian ships were placed on the EU's sanctions list.

1.2.6   Illegal arrests and arbitrary detentions

With the illegal arrest of the sailors, Russia is pursuing objectives similar to those underlying the arbitrary detention of Crimean Tartars, who have mostly remained loyal to Ukraine and ethnic Ukrainians in Crimea. The sailors became pawns in the Minsk Process, through which Germany, France and the Organization for Security and Cooperation in Europe (OSCE) are now working for a peace settlement in eastern Ukraine. Russia refused to release the sailors immediately as ordered by the International Tribunal for the Law of the Sea in Hamburg in May 2019, and indeed did not set them free until November 2019, in the course of a prisoner exchange made under the auspices of the Minsk Process. This also illustrates a pattern of action: Moscow generally makes concessions only on the basis of political exchanges, not by bowing to international law.

1.3   Russia's thrust to the south

1.3.1   The Black Sea as a hinge to Asia and a bridge to the Mediterranean

Additional consequences associated with Russia's expansion include deteriorating relations with other Black Sea littoral states, such as Georgia, Romania and initially Turkey, as well as a burgeoning confrontation with NATO. The following figures illustrate the new, shifted balance of power: Russia now controls about one-third of the Black Sea coastline (or as much as 41%, according to other estimates), taking into account the annexed Crimean peninsula (750 km) and the coastline of Abkhazia, which is deemed Georgian under international law (about 200 km). The proportion of this coastline recognized as Russian under international law is no more than 10% of the whole.[1]

The Volga-Don Canal, the Sea of Azov and the Kerch Strait are in economic and geopolitical terms strategically important corridors linking the Caspian and the Black seas. Small Russian battleships belonging to the Caspian Fleet are now traveling these corridors, and "are pushing all the way into the eastern Mediterranean, where the United States' Sixth Fleet is active" (Delanoe 2019a). The Volga-Don Canal is used by Moscow for more than simply controlling trade between the Black and Caspian seas. Moscow also moves warships from the Caspian to the Black Sea through the canal. Because the waters of the canal are exclusively internal waters of the Russian Federation, Moscow controls the passage of international ships. In order to enhance the connective function of the Volga-Don Canal for military and economic purposes, Russia is planning the development of a second, considerably shorter channel between the seas in the context of its "Strategy for the Development of Russian Ports in the Caspian Basin." Kazakhstan is also interested in this project in order to transport oil, liquefied natural gas and rare earths. Due to its low depth and many locks, the existing Volga-Don Canal

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1   These figures vary somewhat in the relevant literature. According to the Stockholm International Peace Research Institute (SIPRI), Crimea's coastline measures 750 kilometers. See also the figures cited in Gonchar 2019: 15.

cannot support a significant increase in goods traffic, or the relocation of larger warships.

The Black Sea serves as an important bridge to the Mediterranean. In this region, Russia is pursuing its interests in Libya and Egypt, for example. However, Crimea has above all become the Russian bridgehead to the Syrian war: More than half of the sea-based Kalibr rockets fired at targets in Syria have come from vessels of the Black Sea Fleet (Klymenko 2019a). This is the "logistical lifeline" (Kuimova/Wezemann 2018a: 7) for Russian troops in Syria and the Syrian government troops. In addition, Russia has been trying for several years to revive the naval unit once maintained by the Soviet navy in the Mediterranean (5th Operational Squadron). Most of the warships in this formation come from the Black Sea Fleet. It provides the logistical basis for the Russian navy's actions in the Mediterranean, and also holds command over the Mediterranean naval unit (Kuimova and Wezemann 2018a).

1.3.2 Hegemonic position in the Caspian region

During the negotiations on the Convention on the Legal Status of the Caspian Sea, signed by the Caspian littoral states in Aktau, Kazakhstan, on 12 August 2018, Russia combined an approach of "transactional neutrality" (Gvosdev 2019: 9) with military strength. Moscow's objective in this case was to keep external actors out of the region. As a concession to the other littoral states, Russia abandoned its original position, shared by Iran, of regarding the entire sea as a "condominium," in the sense of commonly held sovereignty by multiple parties. Instead, the seabed was divided into national sectors for each littoral state, with internal and territorial waters (reaching from the low-water line to a maximum of 15 nautical miles into the sea) as well as an adjoining fishing zone (stretching another 10 nautical miles). Kazakhstan and Azerbaijan in particular benefited from this accord. In addition, the convention provides for free transit by the littoral states between the Caspian Sea and the oceans, giving the otherwise landlocked countries of Azerbaijan, Kazakhstan and Turkmenistan access to the Volga-Don Canal. However, a number of outstanding questions remain; for example, Iran has not yet ratified the convention (as of the end of June 2020).

In return for its concessions to the other littoral states, Russia achieved its security-policy objectives: The convention defines the Caspian Sea neither as a sea or a lake, but rather as "waters," which means the 1982 United Nations Convention on the Law of the Sea (UNCLOS) does not apply. Thus, non-littoral states such as the United States or China do not have a right of passage. Military activities by third-party countries are prohibited. Littoral states are allowed to sail their fleets throughout the entire sea, aside from the areas deemed to be internal or territorial waters. Thus, Russia, which has the strongest fleet, can exercise its military-political dominance as primus inter pares. The security-policy considerations were also in Iran's interest. Tehran, which made the most significant concessions with regard to the division of the seabed and economic resources, was interested in concluding the agreement swiftly due to the sanctions imposed on Iran in 2018, wanting to keep its Caspian northern flank free of U.S. influence.

Long before the signing of the convention, Russia's Caspian Sea navy had already begun shelling targets in Syria. In 2018, Moscow moved the main base of its Caspian naval forces from Astrakhan to Kaspiysk, on the western coast not far from Makhachkala, an important Russian seaport. Climate change may have been a factor here; the piers in Astrakhan have become increasingly silted, making it difficult to access the open sea, requiring dredging. According to Russian military experts, however, there were also significant strategic reasons: Kaspiysk lies closer to the events currently underway in the Middle East, and Russian missiles from there are better able to reach targets in Syria or the Mediterranean (Caucasus Watch 2018).

The Aktau Convention allows the installation of oil and gas pipelines. This would in principle make it possible to build a trans-Caspian pipeline carrying gas to Europe, a goal currently sought by Turkmenistan. Such plans would entail a complicated procedure, however. In large part on Russia's initiative, the Caspian littoral states signed the Protocol on Strategic Environmental Assessment to the Convention on Environmental Impact Assessment in a Transboundary Context (the Moscow Protocol, for short) on 20 July 2018. This is at the same time an integral element of the Framework Convention for the Protection of the Marine Environment of the Caspian Sea (referred to as the Tehran Convention), which the contracting states signed in 2003, and which is part of the Aktau Convention. Accordingly, any pipelines must meet the environmental standards contained in international agreements, including the Tehran Convention and its various protocols. Russia has emphasized that the Moscow Protocol gives all Caspian littoral states the right to participate in an environmental impact assessment. In fact, the Moscow Protocol can also be read as indicating that only those parties under whose jurisdiction a project is initiated (or whose seabed is implicated) need to participate in the construction decision (Cutler 2018). The Aktau Convention also does not designate any institution as a compulsory arbitration body for the resolution of disputes. With these ambiguous legal provisions in place, Russia has provided itself with considerable maneuvering room for future negotiations.

1.4 Moscow's motives and aims

1.4.1 Instrumentalization of threat scenarios

Years before the annexation of Crimea, Russian security-policy documents described the eastward expansion by the United States and NATO as posing military threats. The Russian National Security Strategy of 2009 identified the "unacceptability … of plans to advance the alliance's military infrastructure to its [Russia's] borders," and the "attempts to endow it [the alliance] with global functions," which the document's authors deemed to contravene the norms of international law, as determinant factors in relations (President of the Russian Federation 2009). The Russian Military Doctrine of 2014 emphasizes that the military risks for Russia would increase in a number of respects, but identifies NATO as a primary contributor. After references to "NATO's … increasing potential for violence," the document describes the "deployment of foreign states' military contingents" in Russia's neighborhood and that of its allies (again deemed a violation of international law), as well as "in the bordering waters, in part for the purposes of exerting political and military pressure on the Russian Federation" (President of the Russian Federation 2014a: 12). This was an allusion to the support provided to the Baltic states on the basis of the 2014 NATO summit in Wales – which from the Baltic point of view, however, was a response to their own increased security needs following the annexation of Crimea.

During the Crimea crisis, in official government communications, Russian state propaganda played up a threat scenario supposedly emanating from the West, sometimes extending this to the European Union as – according to the Kremlin view – a "satellite" of the United States. These efforts included the utilization of fake news, for instance that NATO had planned to erect a military base in Crimea. Moreover, in his Crimea speech in 2014, President Putin referred to statements from Kyiv on a swift NATO accession, without mentioning that the transitional Ukrainian government had made it clear that NATO accession was not on its agenda. In addition, Ukraine and Russia had agreed in 2010 on an extension of the Russian Black Sea Fleet's right to use the Sevastopol naval base until 2042. Moreover, since the 2008 NATO summit in Bucharest, it had been clear that "any conceivable NATO membership for Ukraine lies quite some way away" (Wittmann 2017: 93). However, this was intended to give the impression that in the face of Ukraine's imminent accession to NATO, Russia had no option other than the occupation of Crimea in order to avert a "perfectly real threat to the whole of southern Russia" (President of the Russian Federation 2014b). Mobilizing patriotic sentiments, Russia's president sought legitimation in historical policies: the "concrete" prospect of the NATO fleet in Sevastopol, the "city of Russian war glory." Russia, Putin said, was opposed to "having a military alliance making itself at home right in our backyard or in our historic territory" (ibid.).

1.4.2 The Black Sea as venue for Russia's return to great-power status

In 2014, the General Staff of Russia's armed forces made an assertion that continues to be repeated today by Russian politicians, namely that the United States wanted to equip the missile-defense systems stationed in Romania with nuclear Tomahawk cruise missiles, and target these at Sochi on the Black Sea. There was no evidence for this claim (Goltz 2019). Behind the assertion, however, is a goal: the desire to upgrade the Black Sea Fleet with new ships, which the Kyiv government had blocked before the annexation of Crimea. In 2016, Russian Defense Minister Shoygu reported to President Putin that the task of neutralizing the potential threat posed by American cruise missiles had been accomplished. Only a few days later, he stationed the first regiment armed with the latest Russian S-400 anti-aircraft system in Crimea (ibid.). The missile-defense system in Romania has rightly been controversial, and it is regrettable that there has been no cooperation with Russia on this topic, as proposed by NATO. However, the threat potential asserted by Moscow must be challenged. The system is

not suitable for a "neutralization" of Russia's strategic potential and does not destroy the strategic balance between Russia and NATO.

One core motivation underlying Moscow's activity is the desire to act as a global naval power on an equal footing with the United States. In this regard, the navy is regarded as a key element in a foreign policy directed toward establishing Russia as a "great power" of the sea. The Russian naval doctrine of 2017 specifies as a fundamental goal the "support of a strategic stability and international legal order on the world's oceans," in part "by means of an effective use of the navy as one of the fundamental instruments of foreign-policy activity." In this regard, it cites new risks and threats for Russia's national security on the oceans, such as the "efforts by a number of states, above all the United States of America and its allies, to establish dominance on the world's oceans, including the Artic, and to establish an oppressive naval-forces superiority." The

Black Sea, along with the Arctic, the Mediterranean Sea and the Caspian Sea, is among the regions strategically important to Russia. The document highlights the significance of the Black Sea Fleet: The navy's primary task in the "prevention of armed conflict and strategic containment" is the "enhancement of the Black Sea Fleet's operational and combat capabilities through the development of combined forces on the territory of the Crimean Peninsula" (President of the Russian Federation 2017: 8, 28b, 24a, 38e).

1.4.3   Control of transport and communication routes

Russia is seeking control over economically significant routes in a portion of the world's seas and oceans. Access to energy markets is of particular importance, as is the protection of critical (energy) infrastructure. Just as independent policies in neighboring states are regarded as unacceptable, there is a tendency to "securitize" the foreign-trade and energy-policy aspects of maritime policy. The Energy Security Doctrine of the Russian Federation, released on 13 May 2019, highlights numerous political and military threats, such as the "severe deterioration of the military-political situation (with regard to intergovernmental relations) and the creation of conditions for the use of military force" (President of the Russian Federation 2019b: 13a). Among the "cross-border threats to energy security" (ibid.: 19) are also "terroristic and sabotage activities that do damage to the infrastructure and objects of the fuel and energy complex" (ibid.: 19a). In this doctrine, Russia laments the diminishment in what it views as its traditional external energy markets, as well as the difficulties in entering new energy markets (ibid.: 11a). The "foreign-trade and foreign-policy threats" (ibid.: 11) identified in the doctrine can also be read as a criticism of the European Union. They include, for example, the internal European energy market operated by the EU (see chapter 6). From the Kremlin's point of view, these foreign-policy threats also include contract-law, international-law and financial mechanisms that from Moscow's perspective are aimed at damaging Russia's fuel and energy complex, as well as the Russian economy as a whole (ibid.: 11b). The same applies to what appears from the Russian point of view as "discrimination against Russian fuel- and energy-complex organizations in the world energy markets through changes in the energy sector's international normative-legal regulation, in part under the pretext of realizing the climate and ecological policy goal of diversifying energy-resource import sources" (ibid.: 11v).

1.4.4   Domestic motivation: Preventing a "color revolution"

Moscow regards the Rose Revolution in Georgia, the Orange Revolution in Ukraine and even the Arab Spring as protest movements directed by the United States and their allies, with the aim – in Russia's view – of overthrowing "stable leaders." These often authoritarian and corrupt leaders were generally open to influence by the Kremlin, so their existence helped secure Russia's dominant position. The 2015 National Security Strategy of the Russian Federation explains the Russia-Ukraine conflict with reference to the foreign-policy interests of the United States and the European Union, highlighting the implications to Russia's security of instability in Ukraine caused by Western nations: "The position of the West, directed toward resisting [Eurasian] integration processes and creating breeding grounds for tensions in the Eurasian region," has a "negative influence on the realization of Russian national interests," the strategy indicates. Moreover, U.S. and EU support for "the unconstitutional coup in Ukraine" has "led to a deep division in Ukrainian society, and to the emergence of an armed conflict" (President of the Russian Federation 2015: 17). Accordingly, in the Russian Military Doctrine of 2014, the emergence of "breeding grounds of international and interconfessional tension" and the establishment of "regimes" in Russia's neighborhood "whose policies threaten the interests of the Russian Federation" and which have arisen "in part due to the overthrow of legitimate organs of state power" are interpreted as a threat to Russia's own claims to power (President of the Russian Federation 2014a: 12 l, n). Behind the scenarios outlined in the doctrine stands the Kremlin's fear of itself falling victim to protest movements calling for a regime change. This is why Moscow has intervened in Ukraine and, for similar reasons, in Georgia. A reorientation of the two most important states of the Eastern Partnership (EaP), in the sense of European integration and their development into successful, corruption-free democracies, would provide an attractive countermodel to the authoritarian kleptocracy established by President Putin. In addition, any economic- and security-policy strengthening of these two geostrategically exposed countries – of which Georgia (or the South Caucasus) forms a "continental 'on-land Suez Canal'" (Frederick Starr) between the Black Sea and the Caspian Region – would threaten Russia's influence as hegemon. However, referring

to the "threats from the West" has a further domestic political function for the Kremlin. The demonstration of restored great-power status is intended to serve the purposes of national pride, distract from internal failures and mask the fact that the economic and state modernization promised by President Putin has largely failed to materialize.

It is not always possible to make a clear distinction between domestic and foreign-policy motives. For example, the de facto states of Abkhazia and South Ossetia, recognized by Russia (and few other states), serve to control and destabilize Georgia. In official Russian foreign-policy documents, strengthening these two de facto republics is placed at the top of the list of "regional priorities" (MoFA of the Russian Federation 2016: 57).

1.5 Patterns of Russian policy actions

In the course of its annexation of Crimea, Russia has developed strategic patterns of action that it is carrying out in parallel in other EU neighborhoods and coastal areas, and which it could increasingly apply in the future. The repetition of these patterns is intended to cement the country's (military) dominance through the progressive establishment of a "new normal" in the Black Sea region, with rules primarily determined by Moscow. The information contained in the following sections is largely based on the work of the Monitoring Group (MG) of the Black Sea Institute of Strategic Studies (BSISS), as well as the Kyiv-based Black Sea News internet portal led by Andrii Klymenko. As the only currently active monitoring institution focused on these issues, the MG provides reliable data and facts on the Crimea annexation and its consequences.

1.5.1 A2/AD zones in the Black Sea designed to secure Russia's military dominance

Russia has systematically developed the capacity to intervene militarily from a distance, by deploying modern precision-guided missile systems in Syria and the Black Sea and Baltic Sea regions. A2/AD (Anti-access/area denial) refers to the capacity "to deny opposing land, sea or air forces access and/or the freedom of movement in a selected area of operation, or at least make such movement more difficult, through the use of military means" (Näbig 2017). With the air-defense and anti-aircraft systems and other weapon systems described in selective detail below, Russia has created an A2/AD zone in the region that covers the Black Sea nearly in its entirety. This provides a protective shield over the Russian forces located there, while also reaching into the northernmost part of Turkey and the eastern part of Romania.

Thus, Moscow not only can control the region, but can also make it more difficult for allies of the Black Sea littoral states, for example, to support their partners in an emergency. Turkey, which aside from Russia is the strongest power in the Black Sea region, is strongly affected by this, because it "lies at the intersection of three Russian A2/AD zones … in Crimea, in the Caucasus and in Syria" (Delanoe 2019a). A2/AD capabilities are created through the use of advanced missile-based air-defense systems. In addition, there are sea-based cruise missiles; conventional and nuclear short- and medium-range missiles capable of striking ground, air and land targets; and electronic-warfare systems.

The examples of modern weapon systems and capabilities described below, chosen primarily for their relevance to the development of A2/AD capabilities, did not exist in this form in Crimea before March 2014. The Black Sea Fleet consisted primarily of older weapons arsenals dating from the Soviet Union era. Under the 1997 Treaty on the Status and Division of the Black Sea Fleet between Russia and Ukraine, Russia was prohibited from renewing its weapons stock. Since 2016, Russia has deployed the mobile, advanced S-400 anti-aircraft or surface-to-air missile system in Crimea, with its range of up to 400 kilometers. This can be used against warplanes and cruise missiles at all altitudes. Together with the mobile S-300 anti-aircraft system (range of up to 100 km), it belongs to the 31st air-defense division of the Black Sea Fleet (consisting of one regiment with 12 S-400 systems and one regiment with 12 S-300 systems; to be supplemented further by an additional S-400 regiment). These defensive systems are joined by the mobile K-300P Bastion-P coastal-defense missile systems, developed in Soviet times but since modernized, which are equipped with P-800 Oniks anti-ship missiles, with a range of 300 kilometers, as well as the Bal missile system, equipped with Kh-35 anti-ship cruise missiles with a 260-kilometer range. These systems are designed to protect naval bases, but also have offensive capabilities, for instance against ships. Indeed, it is difficult to distinguish between offensive and defensive capabilities.

1.5.2 Rearmament with nuclear-capable short- and medium-range missiles

The Black Sea Fleet is also being modernized and armed with short- and medium-range missiles on an ongoing basis, with a particular focus on the sea-based, nuclear-capable Kalibr cruise missiles, with their range of up to 2,500 kilometers. On the one hand, these can secure Russia's dominance within the Black Sea region, as they can be deployed with shorter ranges against the coastlines and naval forces of littoral states; on the other, they can also reach more distant destinations in Europe. According to Klymenko's observations, the medium-range Kalibr missiles can be fired from up to 15 submarines and warships (as of August 2019; Klymenko 2019a). In this regard, a key role is played by the Black Sea Fleet's six upgraded Kilo-class submarines, for example, each of which is equipped with four Kalibr cruise missiles that can be fired from underwater. Other than Turkey, no other Black Sea littoral state possesses active submarines. In addition, there are, for example, three Krivak-class frigates (each with eight Kalibr cruise missiles), and three modern Bujan-class corvettes (Bujan B; each with eight Kalibr missiles) equipped with stealth technology, which are particularly suitable for the Sea of Azov's shallow coastal zones (with two others still under construction). In the future, these will be joined by an additional six corvettes of the modern Karakurt class (each with eight Kalibr cruise missiles or eight P-800 Oniks anti-ship missiles), currently still under construction. In addition to the cruise missiles, Russia has deployed tactical ballistic short-range surface-to-surface Iskander missile systems in Crimea. Experts suspect that Russia could use the Iskander system as camouflage, replacing the short-range rockets with Kalibr missile variants with ranges of up to 2,500 kilometers. The United States and NATO assume that Russia has deployed land-based cruise missiles (Russian designation: 9M729; NATO classification: SSC-8) with a range of about 2,500 kilometers which, according to Western security experts, are versions of the sea-based Kalibr cruise missile (Center for Strategic and International Studies 2018). This was the reason for the United States' February 2019 withdrawal from the INF treaty on medium-range nuclear disarmament, which imposed a ban on medium-range land-based missiles with a range of 500 to 5,500 kilometers. In addition, there are new radar and electronic-warfare systems that have the objective of paralyzing or disrupting opponents' command structures and communications.[2] Moreover, Russia has reserved the right to install nuclear weapons in Crimea (Die Welt 2015). As yet, there is no clear evidence that this is already taking place. However, Russia can use the Crimea bridge to quickly bring fully assembled nuclear warheads to Crimea. Alternatively, it could stock its cruise-missile-equipped ships and submarines, which are constantly moving between the Black Sea ports and military bases in Sevastopol and Novorossiysk, with nuclear weapons. It would be difficult to prove this to be the case.

The threat potential posed by Russian short-range and nuclear-capable medium-range missiles in the Black Sea (Klymenko 2019a), which are primarily aimed at targets in Europe and have become a source of significant concern to NATO, can hardly be explained as a Russian reaction to real threats in the region. Rather, it is necessary to look at the "specifically Russian military approach" (Brauß and Krause 2019: 154). The Kremlin expects its actions to provide "decisive strategic advantages in the sense of an escalation dominance relative to the United States and NATO" in the context of a "regional war scenario" (ibid.). The main venues for such scenarios are the Baltics and Ukraine or the Black Sea region. The Kremlin contends that the United States and NATO, and sometimes also the EU as their "satellite" bear primary responsibility for the region's tensions and conflict potential. However, this argument is questionable. "Russia's defensive interests could be regarded as plausible only if there were to be greater concentrations of troops on Russia's borders, which … could be seen as preparation for an invasion of Russia. However, this is not the case either in the Baltics … or in Poland, Ukraine or the Caucasus" (ibid.: 158). From the Russian point of view, the Black Sea region is part of the core of the Russian world and is thus part of Russia's sphere of influence. The Russian approach in such areas is characterized by a revisionist and imperialist conception of geopolitics. Putin justifies the country's behavior with a reference to historical policy, thus calling into question not only the national affiliation of Crimea, but also that of the Black Sea-adjacent Ukrainian territories of Mykolaiv, Odesa and Kherson. According to Russia, the "entire Black Sea region, the western Russian countries" … are "originally Russian territories" (e.g., President of the Russian Federation 2019a). In this light, Russia sees the "de facto subordination of its neighboring states' security interests to Russia's claims to power" as being self-evident (Brauß and Krause 2019: 158). In view of the military weakness of the NATO-allied littoral states of Bulgaria and Romania, as well as of Ukraine and Georgia, a constellation of similar vulnerability to that of the Baltic States in the Baltic Sea region is developing, with Crimea playing a similar role in the Black Sea to that of Kaliningrad in the Baltic Sea region. The difference between the regions lies primarily in the fact that the problem of the Baltic states in the Baltic Sea region is already more firmly anchored in the consciousness of the EU and NATO allies than is the increasingly apparent imbalance in the Black Sea region.

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2 The Black Sea Fleet has also received new warplanes and air forces. However, these are outside the scope of this discussion.

1.5.3   Russia's "escalation dominance"

Whether the "escalation dominance" sought by Moscow is already a reality cannot be conclusively assessed here. The Kremlin-led rearmament of Crimea and the Black Sea Fleet is not going entirely smoothly and is not complete. It also entails substantial financial burdens, is hampered by technological shortcomings and is constrained by Western sanctions. For example, the Bujan ships cannot be completed because the diesel motors needed from German production lines are no longer being delivered due to the sanctions. A shift to Chinese-made motors is proving problematic. For the Krivak-class ships, there is a lack of gas turbines for the drives, which Ukraine is no longer supplying, and for which Russia has as yet been unable to find a substitute. NATO and its member states possess military systems (such as drones) that could undermine the A2/AD zones. In addition, analyses of U.S. and Israeli experiences in Syria indicate that Russia has not been able to create impermeable A2/AD zones there, although such conclusions are not directly transferrable to Eastern Europe. The extent of Russia's dominance is above all dependent on Turkey's future behavior. Not long ago, experts described its fleet as being superior to the Black Sea Fleet, although with balance-of-power trends shifting in Russia's favor (Kuimova and Wezemann 2018b: 12). However, this does nothing to minimize the current risks of a growing regional imbalance of power. Already today, Russia is able to exert considerable pressure on the militarily weaker coastal states. Neither EU and NATO member Romania nor Ukraine can alone curb Russia's quest for dominance in the region or successfully construct their own effective navy, simply because of the financial burdens (Interview with Mykhailo Samus: April 2020).

1.5.4   Internal security in Crimea

By engaging in repression against dissidents and promoting systematic demographic change, Russia is trying to create a population in Crimea that is entirely loyal to the Kremlin. From the Russian point of view, the peninsula is a heavily armed military base, whose sensitive objects must be protected. At the same time, any criticism of the annexation, despite its violation of international law, is prohibited, in order to avoid undermining the legitimacy of Russia's actions. According to Amnesty International, the human rights situation in Crimea is "worrying." Fundamental rights and the freedom of the press are being restricted; "pro-Ukrainian activists, Crimean Tartars, human rights activists, and regime-critical journalists and attorneys are being targeted by Russian Federation authorities as well as the de facto authorities in Crimea" (Amnesty International n.d.). Crimea is the historic homeland of the Crimean Tartars. Their representatives played a major role in the non-violent resistance to the annexation. In response, repression has ranged "from threats and expulsion from the country to 'disappearances' or long prison sentences," justified with "fabricated accusations of extremist, terrorist, and in the case of the Crimean Tartar activists, Islamist activities" (Amnesty International 2019). Russia is also engaging in a systematic transformation of the area's demographic composition. With the integration of Crimea into the Russian Federation and the expansion of the Black Sea Fleet's resources, a large number of military personnel, administrative staff, and members of the security and law-enforcement agencies, along with their families from Russia, are coming to Crimea. At the same time, thousands of locals have been forced to leave their homes for continental Ukraine. Between 2014 and 2019, a total of 175,339 people from regions of Russia, as well as 91,119 people from "CIS countries" ((i.e., in this case, from the occupied areas of Donbas), came to Crimea to take up permanent residence. Over the same period, some 70,000 people left the peninsula for political reasons (Klymenko and Guchakova 2020; interview with Andrii Klymenko: April 2020). According to the Ukrainian Ministry of Defense, the Black Sea Fleet had more than 12,500 soldiers before the Crimea annexation. By 2019, that figure had risen to 32,500 (Molchanova 2020). This is in line with estimates by Mykhailo Samus, who has predicted that this number would rise to 35,000 by 2025.

According to the Rome Statute of the International Criminal Court (ICC), the "transfer, directly or indirectly, by the Occupying Power of parts of its own civilian population into the territory it occupies," or "the deportation or transfer of … parts of the population of the occupied territory … outside this territory" is deemed to be a war crime (ICC 1998: Art. 8b) viii). For this reason, the Regional Center for Human Rights, a Ukrainian organization, together with the Public Prosecutor's Office of the Autonomous Republic of Crimea, filed a communication in early 2020 with the International Criminal Court. This alleged that Russian Federation officials had violated the norms of international humanitarian law, and perpetrated war crimes and crimes against humanity (Interviews with Oleksandra Matviychuk and Roman Martinovsky: April 2020).

1.5.5   Linking energy-industrial and military infrastructures

Moscow is testing dual-use technologies and state-of-the-art surveillance systems on Ukrainian gas platforms in the waters between the west coast of Crimea and the opposing Ukrainian coast near Odesa. These technologies, used for underwater and surface-based military reconnaissance in what Russia views as a potentially hostile environment for the protection of Russia's industrial infrastructure and for the expansion of the radius of action of the country's military-strategic control, are directed against NATO and its allied or friendly littoral states. The gas platforms occupied by regular Russian forces during the Crimea occupation are the property of Chornomornaftogaz, a state-owned enterprise and subsidiary of Ukraine's Naftogaz energy company, and are located in Ukraine's EEZ. Russia has equipped these platforms with a variety of underwater and surface-directed reconnaissance and surveillance systems, such as navigation radar systems. The Russian Black Sea Fleet can use the systems to monitor international shipping traffic as well as the operations of naval vessels from other countries in the northwestern region of the Black Sea. The information obtained can be used for military operations. The platforms are guarded by the Black Sea Fleet and Special Operations Forces of the Russian Armed Forces (Burgomistrenko, Gonchar, Haiduk, Lakiichuk 2018: 7-12; Interview with Mykhailo Samus: April 2020).

As noted above, this allows Moscow to extend its military control to the waters between the coasts of Odesa and Crimea. Experts do not rule out the use of similar gas-infrastructure installations in other areas of the neighborhood. This is also true of the Nord Stream 1 and 2 pipelines. During their construction phase, Sweden justified its objections to the construction of a maintenance platform by pointing to the danger of possible Russian intelligence activities. Ultimately, the platform was not built.

The approach described is also aimed at the economic destabilization of Ukraine. Russia has created a radius in which ships are no longer able to pass. Instead, merchant ships heading for Odesa must now use a corridor that still remains free, which can increase transport costs. There is also a risk that Russia – for example, on the pretext of protecting the occupied energy infrastructure – may close even this corridor, which is currently only 25 kilometers wide at strategically important points and,[3] as in the Sea of Azov, block access to ports and thus disrupt trade. The gas reserves between Odesa and Crimea could be used both for Ukraine's domestic consumption and as exports to Europe. Instead, Russia had already produced for itself about 11 billion cubic meters of gas there by the end of 2019 (Savytskiy 2020).

1.5.6   Grey areas in the international law of the sea

Even before the military confrontation between the Russian coast guard and the Ukrainian navy on 25 November 2018, Russian Foreign Minister Sergey Lavrov declared in a press conference on 23 November that the "Kerch Strait is not a waterway subject to international law. It is Russian" (MoFA of the Russian Federation 2018a). The spokesperson for the Russian Foreign Ministry had said something similar on 15 November, stating that the Kerch Strait was "under the full sovereignty of Russia as the sole littoral state" (MoFA of the Russian Federation 2018b). Article 1 of the 2003 cooperation treaty between Russia and Ukraine, to which Russia expressly adheres, says that the "Sea of Azov and the Kerch Strait constitute historically internal waters of the Russia Federation and Ukraine." Thus, the Kerch Strait is part of the "internal waters" over which Russia and Ukraine jointly exercise sovereignty. In addition, Article 1 states that the "regulation of matters relating to the waters of the Kerch Strait shall be brought about in accordance with an agreement between the parties." According to Article 2, the civilian and military ships of both parties to the treaty may enjoy the "freedom of navigation" in the Sea of Azov and the Kerch Strait. Even assuming, like Russia, that Crimea belongs to Russia, the Russian interpretation of sovereignty violated the 2003 cooperation treaty.

Russia is adhering to the cooperation treaty because this is the best way to realize and justify its own dominance. This is because if the Sea of Azov and the Kerch Strait constitute an internal sea, the current conflict would be largely beyond the jurisdiction of an international arbitration tribunal under the terms of the UNCLOS, adopted in 1982. In such a case, there would be no territorial waters or exclusive economic zones, which would in any case have to be claimed by both parties. This suits Russia, as the Russian coast guard often patrols off the coast of Ukraine. However, Article 2 of the cooperation treaty is most critical for Russia, as it allows military vessels from third countries to enter the Sea of Azov only by the mutual agreement of the two treaty signatories. Russia also took a similar position in the negotiations with the Caspian Sea littoral states (see 1.3.2). By doing so, Moscow has leverage to mitigate NATO's presence in the Sea of Azov, for example.

Ukraine denies that the Sea of Azov is an "internal sea," and argues that the UNCLOS does in fact apply. Currently (as of June 2020), an international arbitration tribunal is hearing the issue, with the case filed in 2016 by Ukraine on the basis of UNCLOS Appendix VII. Russia has denied that the court has jurisdiction.

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3 The most vulnerable site there is the waters between the platform closest to Odesa and so-called Snake Island, which belongs to the Odesa region and is controlled by Ukraine.

If the judges follow Russia on this question, the Ukrainian arguments in the case will not be examined further (Schatz and Koval 2019). If the UNCLOS is applied, Ukraine would even have the right to territorial waters, and the Sea of Azov could be opened to NATO ships. It is questionable whether Moscow would recognize such a verdict and change its behavior. Moreover, it is not obvious that NATO would or should establish a presence given the tense situation in the Sea of Azov.

No matter what its outcome, the ongoing process based on the UNCLOS is significant, as it reveals the internal inconsistency in Russia's reasoning. Moscow's representatives make a distinction between the Sea of Azov and the Kerch Strait. Russia claims "exclusive sovereignty" within the latter, with the justification that Russia is exercising sovereignty "on both sides of the strait" (Permanent Court of Arbitration 2020). In so doing, Russia is contradicting the wording of the cooperation treaty, according to which *both* the Sea of Azov and the Kerch Strait constitute internal waters of both states. Russia also contradicts the idea of internal waters as per customary international law, under which sovereignty over internal waters can only be exercised jointly.

1.5.7 Violations of the law of the sea endanger the security and freedom of navigation

According to Ukrainian experts, Russia's use of maritime warnings made under the pretext of conducting military exercises is restricting shipping traffic in certain marine areas. This, they say, is undermining the 1974 International Convention for the Safety of Life at Sea (SOLAS) and disregards previous best practices for cooperation in international waters (Gonchar 2019; Klymenko 2019b). The use of maritime warnings jeopardizes the security of civilian and especially commercial shipping, and it also frustrates efforts to develop closer economic cooperation in the region. This behavior is also unsettling the fishing industry. In any case, from the point of view of Ukrainian experts, it is undermining the sovereignty of the Black Sea littoral states, whose EEZs are affected by Russia's closure warnings. According to the experts, Russia is ignoring its obligations under SOLAS to report potential and current dangers to shipping traffic, for example due to military maneuvers, to the coordinator responsible for that navigation area. This entity publishes military-maneuver announcements on its website, so that ships can avoid the relevant areas while the maneuvers are taking place. The coordinator for the Black Sea, which is part of the Navarea III (Mediterranean) maritime warning area, is the Hydrographic Institute of the Spanish Navy. In July and August 2019, Russia issued as many as 14 warnings for various areas, in some cases prohibiting all navigation in these areas. Overall, about 24% of the Black Sea's surface area was affected, including a significant portion of the recommended sea routes in Ukraine's EEZ (Gonchar 2019: 17-19; Klymenko 2019b: 13), as well as, according to the Monitoring Group, the EEZs of Bulgaria and Romania (Klymenko 2020). Russia justified the restrictions on navigation by saying it was conducting military exercises. However, contrary to the best practices recommended under SOLAS, most of these planned activities were not communicated to the navigation area coordinator or were not communicated in a timely manner. Thus, the maneuvers could not be published on the website of the Hydrographic Institute of the Spanish Navy (Gonchar 2019: 18-19). Instead, the Hydrographic Service of the Russian Ministry of Defense passed the warnings on to the individual littoral states' hydrographic institutes in a bilateral fashion (interview with Mykhailo Gonchar: May 2020). This circumvented security measures ordinarily put into place during closures due to military exercises.

According to Monitoring Group observations, Russia has also issued a disproportionate number of maritime warnings due to military exercises in 2020, again without appropriate regard for the freedom of navigation. On the one hand, the affected maritime areas include traditional commercial-shipping routes; on the other, the exceptionally high number of exercises involving missile launches in a small sea has created the risk that civilian ships could be accidently hit by missiles. It is particularly problematic that Russia is issuing maritime warnings associated with military exercises due to its annexation of Crimea, and that the corresponding "closures" announced include large maritime areas located within Ukraine's EEZ (interview with Andrii Klymenko: May 2020).

It cannot be determined here whether Russia's behavior formally represents a violation of SOLAS. However, given the high number of maritime warnings and the conduct of maneuvers within such abbreviated periods of time, it appears at least questionable whether Russia is fully complying with its duty of care under SOLAS. Under this duty, the persons affected and all interested governments must be notified without delay if there is any risk of endangerment due to exercises. Nor does it correspond to the sense or purpose of this duty if maritime warnings are issued that lead to restrictions on the freedom of navigation, but which lack a basis in reality because no military exercises are in fact carried out. The "closure" of maritime areas is also problematic when it affects the EEZs of other states. Even if one assumes that military exercises carried out by one state in the EEZ of another are not per se illegal, Article 58 (3) of the UNCLOS creates a duty, which a state conducting exercises must observe, to avoid restricting the sovereign rights of another coastal state in a disproportionate way.

The requirement of proportionality must also be observed in relation to the freedom of navigation, which applies both on the high sea and in the EEZs. The overall impression is that Russia, through a hybrid and manipulative application of exist-ing law, is seeking a "creeping jurisdiction" that will make it eas-ier for it to extend its control in the Black Sea. A more precise assessment of the circumstances will require detailed examina-tion of the events described, and of others like them.

1.5.8   Closure of waters in order to block NATO

Just days before the beginning of the traditional U.S.-Ukrainian Sea Breeze exercises in 2019, conducted by NATO states and their partners since 1997, Russia announced a military exer-cise in the location of the NATO exercise, thus closing a mari-time area of 8,000 square kilometers. At the same time, Mos-cow announced through the Black Sea Fleet Department of Information for the Press Service of the Southern Military Dis-trict that "ship groups of the Black Sea Fleet" were "continu-ing the complex of measures aimed at controlling the activities of the NATO ships participating in the Sea Breeze 2019 naval maneuver in the northwestern part of the Black Sea" (Sput-nik Deutschland 2019). This time, Russia did report the exer-cise to the navigation-area coordinator, but only shortly be-fore the beginning of the exercise, and later than NATO. This is contrary to the spirit of good cooperation and good practice at sea. NATO avoided the conflict and shifted its location. How-ever, Russia did not relent following NATO's concession. On 10 July 2019, despite warnings, a Russian destroyer entered the NATO exercise area while firing drills were taking place, provoking a dangerous situation. The Russian demonstration of power in the northwest part of the Black Sea was intended to show Ukraine and Romania, the littoral states there, as well as NATO, that Russia can make rules unilaterally, and can exert control over the entirety of the sea (Gonchar 2019: 16-17). As far back as July 2016, in its summit statement from Warsaw, NATO had already identified Russia's "large-scale snap exer-cises in violation of the Vienna Document" as a form of desta-bilizing behavior in the Black Sea (NATO 2016: 10).

1.5.9   Hybrid interference maneuvers

Another example in which Russia has undermined the interna-tional law of the sea is its disregard for the use of the Automatic Identification System (AIS) prescribed by SOLAS for all ships. This system provides for the security of navigation by allow-ing ships to be identified, providing information about their size, course and port of destination. In fact, however, foreign-flagged ships calling illegally at Crimea's ports shut off their AIS systems immediately after traversing the Bosporus and deliver false re-ports to destination ports. Based on the ports of registration and the ships' owners, a certain share of these are Russian ships (interviews with Mykhailo Gonchar: May and June 2020). This behavior endangers safety at sea, while also undermining the sanctions imposed on Russia (Klymenko 2019b: 14-16).

Additional hybrid threats include the purposeful disruption of global navigation satellite systems (GNSS), including the United States' Navstar Global Positioning System (GPS), which is widely used in the shipping industry, and the EU's Galileo system. GNSS spoofing refers to the use of strong radio trans-mitters to overwrite the signals produced by global navigation systems, with the goal of rendering navigation systems tempo-rarily inoperable or providing false positional information. The damage caused by GNSS spoofing goes well beyond the mil-itary; since the vast majority of international cargo ships use GPS, it means a reduction of safety at sea. The international SOLAS convention, adopted in 1974, does not yet regulate GNSS and GPS spoofing. However, GNSS spoofing is contrary to the spirit of the convention, as SOLAS does prohibit unsanc-tioned interference in navigation systems.

The EU Commission has identified the targeted jamming and spoofing of GPS signals as one of several hybrid threats. Rus-sian GNSS spoofing aims at obfuscating the positions of mil-itary installations, government buildings and important per-sons. In 2019, a study by the Center for Advanced Defense Studies (C4ADS) documented around 10,000 cases of GPS jamming by Russia that disrupted the signals of GPS and simi-lar systems over a two-year period (2016 – 2018). During this observation period, a total of 1,311 ships in Russian (or de facto Russian-controlled) waters had to correct their courses due to the disruption of their navigation systems. Particu-larly significant clusters in this regard were recorded in the vi-cinity of Crimea, in Black Sea coastal regions and near Rus-sian ports. These attacks, which are regarded as electronic warfare, also serve to distort the courses of borders with NATO states and the positions of military installations in Rus-sia. Russian GPS spoofing is not a new phenomenon, but its in-tensity and geographical distribution has increased. Moreover, Russia is also using it in other EU neighborhoods against NATO members such as Norway.

Political and economic allies as well as transport routes in the Black Sea and Caspian region

Last update: June 20, 2020

1.6   Shift of forces in the region in Russia's favor – Imbalances in the Black and Caspian Sea region

1.6.1   No counterweight to Russian dominance among the littoral states

Russia's goal is to neutralize Turkey in the Black Sea region. For its part, Ukraine hopes for more cooperation with Turkey, but Ankara has not drawn clear conclusions from Russia's military intervention in Ukraine (see 2.1.3). At the same time, Ankara's passivity is a problem for NATO. Turkey is the only NATO member on the Black Sea that has a strong navy,

and which could undermine Russia's effort to establish A2/AD zones. NATO itself has identified the risks associated with Russia's actions, including Moscow's "provocative military behavior near NATO's borders, including in the Baltic and Black Sea regions, and in the eastern Mediterranean" (NATO 2016: 10), and has reacted by increasing the presence of NATO ships in

the Black Sea. However, the Montreux Convention limits the presence of warships from non-littoral states to 21 days (see 2.1.1). Thus, in view of the facts already established by Russia within this maritime region, it is questionable whether these measures can suffice to ensure the security of non-Russian littoral states. The same is true of the measures that NATO adopted following the annexation of Crimea, at the 2014 summit in Newport and the 2016 summit in Warsaw. These primarily strengthen the northeastern flank of the alliance – that is, the Baltic countries and Poland – rather than the southern Black Sea littoral nations of Bulgaria and Romania. Individual NATO countries, notably the United Kingdom and the United States, are supporting Ukraine in its construction of a "mosquito fleet" of small, agile craft for the purposes of strengthening coastal protection, in part by training military personnel. However, Ukraine remains at the beginning of this process, and the conflict in Donbas is tying down its armed forces and draining military expenditures.

There is no consensus among the NATO Black Sea coastal states, Romania and Bulgaria, on how to meet the Russian challenge. Romania feels threatened by Russia. Bucharest has called for a stronger NATO presence in the Black Sea region and has strengthened its relations with Ukraine. By contrast, the Bulgarian government sees no threat to its own security. To be sure, Bulgaria is not the Russian "Trojan horse" within the EU and NATO that some Russian diplomats and politicians would like to see. Sofia wants to be a reliable NATO member; it is modernizing (if without haste) its armed forces' outdated equipment, and supports the measures adopted in response to the annexation of Crimea. Nevertheless, Russia has significant influence in Bulgaria, facilitated by pro-Russian oligarchic networks and shortcomings in the rule of law. Moscow

"controls key chunks of the [Bulgarian] economy," and in the energy sector, Bulgaria is virtually wholly dependent on Russia (Bechev 2017: 111). In 2016, Romania proposed the creation of a Turkish-Romanian-Bulgarian NATO flotilla. For its part, the Boyko Borrisov government has been reluctant to support measures that would increase NATO's presence in the Black Sea. The Bulgarian prime minister rejected the initiative, primarily out of consideration for Russia, but also because Bulgaria feared Turkish dominance within the flotilla.

However, the tensions in the Black Sea region cannot be addressed only with security-policy measures. A desirable goal would be to strengthen regional cooperation, while at the same time increasing the EU's presence in the region, finding greater common ground between the EU littoral states and their associated partners, and making new cooperation and trust-building overtures to Russia. The Black Sea Synergy initiative launched by the EU in 2007, which focuses on strengthening regional cooperation in areas such as blue growth, maritime policy, environmental protection and tourism, offers a set of initial approaches in this regard. However, it lacks a strategic-policy profile; moreover, awareness of the potential of this initiative and the positive results already achieved is very low within the Black Sea littoral states' populations.

In recent years, Russia has transformed the status quo in its favor in the Caspian Sea region too, including in the entire southern Caucasus. In addition to the prohibition on the use of the Caspian Sea by the navies of non-littoral states (see 1.3.2), the 2018 Aktau Convention gives Moscow additional leverage to shape relations with the Central Asian littoral states according to its own interests.

1.6.2 "Frozen" conflicts and Moscow's offers of cooperation – and their impact

Russia is exploiting the conflicts in the region for its own benefit. In 2008, Moscow intervened militarily in Georgia in favor of the de facto regime in South Ossetia, then recognized South Ossetia and Abkhazia as independent states, expanding its own military presence. In so doing, Russia has put an indefinite stop to further Georgian efforts to strengthen its ties to NATO. In addition, Moscow is exerting political and economic pressure to prevent Georgia from integrating further into European structures. In the conflict over the Nagorno-Karabakh region, Russia has traditionally sided with Armenia, which it supports economically and militarily. Exploiting this dependence, Russia prevented Armenia from concluding a signature-ready, fully negotiated association agreement with the EU in 2013. Instead, Armenia joined the Eurasian Economic Union (EAEU).

Russia portrays itself as Armenia's protector against Azerbaijan and Turkey. In fact, Moscow "benefits from Azerbaijan's considerable purchasing power, and since 2010 has become the biggest supplier of weapons to Baku" (Aslanyan 2018: 173). Together with the United States and France, Moscow has since 1997 chaired the Minsk Group which, under the aegis of the OSCE, has served as a mediator in the Nagorno-Karabakh conflict since 1992. Russia wants to keep its southern borders stable. However, it is doubtful whether Moscow would be interested in a resolution to the conflict that enabled more regional cooperation in the South Caucasus, as the EU aims at. The Kremlin is said to be interested in a "controllable instability" (Uwe Halbach), in order to be able to influence both parties to the conflict (Hasanov 2019: 308).

After the war in Georgia, there could be little doubt that Russia is prepared to assert its interests militarily. The annexation of Crimea and the military action in eastern Ukraine since 2014 has shown this definitively. President Putin has also told Kazakhstan that it is "part of the large Russian world," recalling that 23 percent of Kazakhstan's population belongs to the Russian minority (Traynor 2014). The threat was all the more effective because the EU, the United States and NATO have done little to counter "Moscow's aggressive foreign-policy line" (Varwick 2017: 114). The governments in the region drew their conclusions and arranged themselves accordingly.

In Azerbaijan, as in Kazakhstan and other Central Asian states, the Kremlin supports the ruling elites in their efforts to retain power. Moscow offers no criticism if elections are manipulated, or if the free press and political opponents are suppressed. Beneficiaries of this support have included Azerbaijan's authoritarian President Ilham Aliyev, whose foreign policy has shifted from a "pro-western policy to one of non-alignment" (Cornell 2018: 245). A similar assessment holds for former Kazakh President Nursultan Nazarbayev, who secured life-long political influence by making changes to the constitution. When protests erupted in 2016, he warned against attempts to mount a color revolution, recalling Russia's influence and Ukraine's difficult position. In contrast to its Central Asian strategy of 2007, the EU has since abandoned "any democracy-related conditionality in its foreign policy toward Central Asia" (Schiek 2019: 33).

However, Russia too is making offers of cooperation and integration, for instance in the context of the EAEU founded in 2014 with Kazakhstan, Armenia and Belarus. Even if Moscow dominates this body, there are at least the structures of a multilateral organization in place, which offers all participating states the opportunity to assert their interests at least in part. From the point of view of the Central Asian states and Armenia, it is in any case a preferable alternative to the trade boycotts under which Georgia and the Republic of Moldova have at times suffered badly.

Russia has also demonstrated some flexibility, particularly when this serves to hold the United States, NATO and the EU at a distance in the region. With regard to Azerbaijan, for example, Moscow is pragmatic and accommodating, which is in stark contrast to its policy toward Georgia. Thanks to its resources, Azerbaijan has gained a certain economic and political autonomy in the region, in addition to prosperity. However, this is distributed unequally within the country itself. Baku maintains good relations with the United States and NATO, and it attaches great importance to cooperation with the European Union, even without being interested in association or membership. In return, the Kremlin accepts that Baku is pur-

suing energy and infrastructure projects with the EU that may bypass Russia. Even if Azerbaijan "can have its own links, corridors and export routes that bypass Russia, it will use Russia as one of its options and partners, and more importantly, it will never participate in the efforts to contain Russia or use its geography in order to block Russia's access to the south" (Gvosdev 2019: 11). Azerbaijan is playing a key role in the construction of a 7,000 kilometer north-south transport corridor sought by both Russia and Iran, which is intended to link Russia with the Gulf ports and India's rail network via a rail line running through Azerbaijan and Iran.[4] This project also contributes to the fact that Azerbaijan's sometimes-tense relationship with Iran is also pragmatic and shaped by common economic interests. Tehran sees the countries of the South Caucasus as lying within its own sphere of influence, and views Azerbaijan's good relations with the United States and Israel with suspicion. Russia is including Azerbaijan on an equal footing in a trilateral dialogue process between Moscow, Baku and Tehran, because "it would not be in Moscow's interest to have two hostile states in the South Caucasus, which would certainly contribute to strengthening the Ankara – Tbilisi – Baku axis and the West along Russia's southern belt" (Aslanyan 2018: 166).

To the Caspian littoral states that lack Azerbaijan's scope for independent action, Moscow is displaying its dominance, for example in the case of energy-policy relations with Turkmenistan. For some time, Gazprom, the Russian state-owned company, bought Turkmen gas at low prices and monopolized its distribution; then in 2009, when Turkmenistan wanted to increase prices to match the (higher) European level, the company exited its long-term supply contracts. In 2016, Gazprom finally halted imports of Turkmen gas.

Nevertheless, the Central Asian states such as Uzbekistan and Kazakhstan do pursue a self-reliant, multivector foreign policy. To be sure, they remain reliant on cooperation with Russia and China, whose influence in the region is not matched by that of the European Union. However, there has for some time been evidence of growing interest in regional cooperation without the direct participation of Russia and China. This has to do with the political changes introduced by Uzbekistan's President Shavkat Mirziyoyev, who took office in 2016. Following the death of long-time autocrat Karimov, he has pursued a controlled opening and reforms "in the direction of a 'modern' authoritarianism and … growth policy" (Schiek 2018), in which regional cooperation plays an important role.

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4   The text refers to the maritime area between Iraq, Iran, Kuwait, Bahrain, Saudi Arabia, Qatar, the United Arab Emirates and Oman as the "Gulf," and the Persian Gulf region as the "Gulf Region."

1.6.3   Opportunities and risks for the EU in the South Caucasus and the Caspian region

Although the EU is the most important trading partner for the countries of the South Caucasus, it is failing to realize the full potential of the opportunities available. It is at least questionable whether Brussels is offering sufficient support to its partner countries in their reform processes in the context of the Eastern Partnership program. This can be seen in the example of Armenia. It is true that Brussels reacted swiftly after the events of 2013, concluding a "comprehensive and enhanced partnership agreement" (CEPA) with Armenia that is compatible with Armenia's membership in the EAEU. However, it remains unclear whether this type of cooperation can provide sufficiently effective support for the reform agenda of Prime Minister Pashinyan, who assumed office following the popular protests of April 2018. The German federal government wants to phase out international state cooperation with Armenia (Hein and Schäfers 2020), even though the country has shown a reform orientation.

In the Caspian region, the new Uzbek president's reforms and approaches, aiming at enhanced independent regional cooperation without the participation of Russia and China, are meeting with interest from the country's Central Asian neighbors. This opens up new prospects for the European Union, which, with its second Central Asian strategy, adopted in 2019, wants to promote regional cooperation as a foundation for stability and development. The EU is seen in the region as a credible partner without hegemonic ambitions. Its support is desired, and its expertise (for example in the areas of trade promotion, the initiation of investment and environmental protection) is valued and needed.

However, the EU lacks a strategic approach within the Caspian region. With the new Central Asian strategy, it wants to contribute to resilience and prosperity in Central Asia; the Caspian region receives only marginal attention. Moreover, the Central Asia strategy is not strongly guided by political interests and will do little to change the current political imbalances within the foreseeable future. It can hardly compete with Russia's far-reaching economic and political influence in the Central Asian and Caspian states; nor can it rival China's New Silk Road initiative from a financial perspective. In the case of Kazakhstan, for example, Brussels can at best promote a controlled "top down" modernization and "administrative participation"; however, in the view of Kazakh policymakers, for example, such policies are intended to "secure authoritarian rule over the long term" (Schiek 2019: 6).

The EU connectivity strategy published in September 2018, as well as the "From West to East in Half an Hour" EU transport policy launched in 2014 on the basis of the Trans-European Transport Network (TEN-T), are both heading in the right direction. Each of these initiatives in particular "reflect the interests of the EU in the South Caucasus" (Jacopo Pepe in Panfilova 2019). However, the EU could also use these instruments as a basis to improve access to the Caspian region, and to contribute to modernization and economic stability through important transport infrastructure projects, such as ports and key rail-network links. This would in turn serve the interests of security.

Russia sees its interests as being endangered, and is pushing back, exploiting the shortcomings of the region's states. One key project for regional development and diversification is the planned deep-sea port of Anaklia on the Georgian Black Sea coast, in close proximity to Abkhazia. The EU has pledged €233 million in support of the project's second phase of construction, along with another €100 million earmarked for the construction and repair of roads and rail lines to the port. The project is of great significance to the region, and to strengthening Georgia's role as a transit country. Large Panamax-class cargo ships could dock at the planned deep-sea port, which would be one of the largest on the Black Sea. An alternative route for East-West trade, independent of Russia, would then reach across Georgia, Azerbaijan and Central Asia to China. This would in turn facilitate EU access to the Caspian region and strengthen Georgia's position in the European and Euro-Atlantic spaces in the sense of increased security through deeper integration (interviews with Paata Gaprindashvili: January and April 2020). Even Abkhazian stakeholders see the potential for economic growth due to the creation of new jobs and economic cooperation, and the generally positive effects the project would have on socioeconomic conditions in Abkhazia (ibid).

However, in early 2020, the Georgian government, which formally supported the project, terminated the investment agreement with the Anaklia Development consortium, the consortium responsible for the port's construction. Observers blame non-transparent, clientelistic decision-making processes and the particular interests of unofficial Georgian power brokers who feared that their relationships with Russia would be jeopardized. These figures are said to be concerned with a supposed "stability" rather than the general state interest – for instance, the strengthening of Georgia as a transit country, or the integration of Georgia into European structures with a view to further economic development. The example shows that selective justice and poor governance are factors that make it easier for Russia to exert its influence in the region. To be sure, some individual official representatives of the EU and its member states have publicly expressed their concern over the status of the port project. However, observers say the EU has failed to provide ongoing political support for the project, and has not intervened at the highest political level in a timely manner, as it has done effectively for important reform projects in other Eastern Partnership countries (ibid.).

2. Turkey: A contradictory new policy

2.1 Ankara's security policy has reached a crossroads

Throughout the 1990s, Turkish governments pursued an ambitious Eurasian agenda. However, over time, they abandoned this agenda and, as a result, under the leadership of the Justice and Development Party (AKP, Turkish: *Adalet ve Kalkınma Partisi*), post-Soviet Eurasia has lost its prominence in Turkish foreign policy. In contrast to the more proactive policy approach taken by the Turkish government in other regions of the world (such as the Middle East and North Africa), the current administration is much more narrowly focused on its foreign policy objectives in the Black Sea and Caspian region. This is a result primarily of Russia's regional predominance.

2.1.1 The Montreux Convention of 1936 as the cornerstone of Turkish security policy

In order to maintain the Black Sea as a stable maritime region, Ankara has traditionally preferred collective security mechanisms that involve the littoral states. Ankara has never been comfortable with too much involvement on the part of external powers, including NATO countries, in Black Sea regional affairs. States in the region should bear themselves primary responsibility for their own security. Therefore, in Ankara's Black Sea discourse, the Montreux Convention of 1936 is the key document informing maritime security in the region. The Convention regulates the passage of naval vessels from the Mediterranean through the Turkish Straits into the Black Sea and gives Turkey control over the straits and the right to receive notification of an intended transit through them. Turkey has also always been careful not to let the Black Sea become a "battlefield" between Russia and NATO as it maintains a subtle balance between NATO and Moscow. Anything else would have endangered the modus vivendi that has made the Black Sea a shared source of Russian-Turkish security since the end of the Cold War. From the perspective of both Ankara and Moscow, any effort to question Montreux would harm their respective interests and open up the opportunity for external security actors, that is, the United States and other NATO members, to gain access to the Black Sea. NATO membership for Bulgaria and Romania, two countries that brought only marginal naval capabilities with their 2004 accession, has not had a significant impact on Ankara's view in this regard. The Black Sea Economic Cooperation, the Black Sea Naval Cooperation Task Group (BLACKSEAFOR) and Black Sea Harmony each serve to facilitate regional relations, including Russia, and to maintain the Montreux Convention regime. In practice, however, these initiatives currently make no difference in terms of the shift of power toward Russia in the Black Sea region.

Initially, regional developments throughout the 1990s and 2000s, such as the fall of the Soviet Union, a weakening Russia and the consolidation of relations with the newly independent littoral states, placated fears of security risks and contributed to an increased sense of security in the region – at least until the outbreak of the Russo-Georgian war in 2008. During this period, Turkey increasingly saw the Black Sea as a shipping corridor opening up new transport, trade and energy routes to Europe, the Caucasus and Central Asia (Bozkurt 2011).

However, Turkey itself was the dominant naval force in the region at the time. The dissolution of the Soviet Union meant Turkey was the state with the most powerful military resources in the Black Sea region for nearly 25 years. More recently, however, the strategic balance has shifted radically in Russia's favor. Turkey's ability and, in particular, its military and economic capacities, to play a proactive strategic role in the Black Sea and Caspian region has given way to Russia's more massive influence in the region. Since its annexation of Crimea in 2014, Russia has expanded its naval capacity engaged in a display of its power to the south. Today, Turkey is located at the intersection of three Russian A2/AD zones (see 1.5.1) and is surrounded by Russian influence to the east and south. Although this really is a matter of concern to Ankara, Turkey has to date done nothing to revise its own approach to the Black Sea.

The so-called Istanbul Canal project (see map, page 10), which is relevant to Turkish security policy and security throughout the Black Sea region, has long been promoted by the Turkish government. As early as 2011, Recep Tayyip Erdoğan floated in Istanbul the idea of building a new shipping canal between the Black Sea and the Sea of Marmara that would relieve the overcongested natural Bosporus waterway (Hürriyet 2011). Since 2019, the government has begun introducing concrete measures for the construction of the canal. Both in Turkey and internationally, the project raises questions regarding the extent to which it would undermine the Montreux Convention. On the domestic front, more than 100 retired Turkish diplomats have recently announced their security concerns

that could prevail in the wake of the canal's construction. The fact that it would circumvent the Montreux Convention is seen as a security-policy risk (Hürriyet 2020b). To date, the official government position on these issues is that the new canal will be used exclusively for private shipping traffic and will serve to relieve the congested Bosporus shipping lane. It also claims that this will have no effect on the Montreux Convention regime.

To be sure, it is difficult at this point in time to draw any clear conclusions regarding the potential consequences of the planned Istanbul Canal. In addition to the political debates, a movement opposing the canal's construction has emerged in recent months that draws attention to environmental concerns and fears of a potential threat to the Istanbul metropolitan re-

gion's water supply (Istanbul Metropolitan Municipality 2019). However, it is clear that concerns are growing with respect to the proposed canal's implications for security in the Black Sea region as it would allow for the uncontrolled passage of military ships into the Black Sea.

Ankara's Black Sea security policy thus stands at a crossroads. Given the changing dynamics in regional security described above, Turkey now faces the historic challenge of maintaining a delicate balance between two difficult options: opening the region up to an increasing presence of NATO troops or allowing Moscow to transform the Black Sea into a "Russian lake." A third option would, of course, involve developing alternatives that establish greater security with the other littoral NATO states.

2.1.2 Colliding interests with Europe and the United States

Given Russia's actions in the region since 2008, one might have expected Turkey to bury its differences with "the West" and establish a shared counterweight to Russian influence in the Black Sea region. But this is not the case, and nothing of the sort is anticipated in the near future. There are several reasons for this.

The first involves the state of Turkey's relations with the EU and the United States. In the past, Turkey balanced Russian attempts to interfere in the region with active Western military support. However, tensions between Ankara and its EU and NATO partners have since led to contradictory security policies. This has been true since 2016, when elements of the Turkish military carried out an attempted coup. Following the break in Russian-Turkish relations in 2015, when Turkish fighter planes shot down a Russian fighter plane on the Turkish-Syrian border, Russia and Turkey have re-established their relations. Despite the conflicts of interest between Ankara and Moscow – including those relevant to the greater Black and Caspian Sea region – Turkey is showing an increasing tendency to cooperate with Russia. Both countries' deteriorating relations with the EU, the United States and NATO are a unifying factor.

The second driver of closer relations between Ankara and Moscow is to be found in Turkish domestic politics. Turkey's turn away from democracy has drawn criticism, particularly from the EU. Since 2016/2017, the country's political upheaval has not only affected Ankara's relations with EU member states and the United States, but has also led to a closing of ranks with Russia, which has also stepped up its actions against domestic political opponents. Furthermore, anti-Western rhetoric

and nationalist jingoism are popular instruments for winning votes in both countries.

The third driver of deepened relations between Ankara and Moscow is the war in Syria and the threat scenario this poses – from the Turkish point of view. The shifting dynamics in the Syrian war and the consolidation of Kurdish autonomy in northern Syria have made it crucial for Turkey to seek a reconciliation of interests with Russia. Turkey has required a green light from Moscow in order to play a role in Syria and carry out its cross-border operations. Turkey pays close attention to what happens in the south in part also because of the country's domestic political mood. While Turkish society demonstrated considerable solidarity with Syrian refugees at the start of the civil war, this attitude has changed in recent years in light of the economic crisis. For example, Syrian refugees are now seen as cheap competition in an already tight labor market. In any case, the outcome of Russian-Turkish cooperation in Syria also has an impact on the Black Sea region.

Turkish economic interests are a fourth driver of Turkish-Russian rapprochement. One of the most important aspects of the changing dynamics of Turkish-Russian interaction in the Black Sea region is energy policy. Until recently, Turkey obtained half of its natural gas from Russia. Such dependencies make it difficult for Ankara to form a counterweight to Russian power in the Black Sea region. The energy aspect is discussed in greater detail below (see 2.2). Moreover, in recent years, particularly since the failed military coup, the Turkish economy has increasingly benefited from Russian tourists and has expanded trade with Russia in the agricultural sector.

In fact, the succession of political crises – the attempted coup in 2016, the deterioration of domestic security through, for example, clashes between the Turkish army and the Kurdistan Workers' Party (PKK) in southeastern Turkey, the transition to authoritarian presidential rule and geopolitical instability in the Middle East – has worn heavily on Turkey's political, economic and security environment. Since 2011, with the onset of the Arab Spring and the war in Syria, Turkey's geopolitical situation has changed in ways that are directly affecting both its domestic political environment and the development of external relations. The war in Syria has led to a reorientation of Turkey's relations with all actors in the conflict, but with the United States and Russia in particular (Bertelsmann Stiftung 2019b).

2.1.3 Colliding interests with Russia

Despite the strengthening of ties between Russia and Turkey, the two countries' interests with respect to the Black Sea and Caucasus are clashing in many ways. As geopolitical competitors, Moscow and Ankara are selective about cooperation. Both are capable of disaggregating and separating various aspects of their "multilayered relationship" (Torbakov 2019). Neither country seeks to pursue shared strategic goals. Instead, they remain flexible and interest-driven as they focus on pursuing a common process in their bilateral relations (Delanoe 2019b).

In the conflict over Nagorno-Karabakh, Russia and Turkey support the actors that stand in opposition to each other. Whereas Moscow has a defense agreement with Armenia, Ankara is committed to a strategic partnership and mutual assistance agreement with Azerbaijan (International Crisis Group 2018). In parallel to increased cooperation in the energy sector, Azerbaijan, Georgia and Turkey are also strengthening their ties in the defense sector. All three countries have a strong desire to expand their trilateral military cooperation. It is in their common interest to protect areas featuring oil and gas transport infrastructure, particularly in light of the various more or less "frozen" conflicts in the South Caucasus, Nagorno-Karabakh, South Ossetia and Abkhazia, and given the proximity of Russian military bases. Based on a mutual commitment to providing help if needed, these three states' alliance is driven by security interests. Their trilateral meetings take place in the Ministries of Foreign Affairs, Defense, Economy and Transport, among their armed forces, in Parliamentary Committees for Foreign Affairs, and in other working group forums. After the first meeting of the respective foreign ministers on June 8, 2012 in Trabzon, Turkey, all three countries signed the Trabzon Declaration. In May 2016, the three defense ministers resumed the trilateral meetings. Following a meeting of defense ministers in May 2017, the three countries carried out a military exercise near Tbilisi. In April 2018, the three defense ministers signed a memorandum providing for a closer trilateral defense partnership (ibid.). However, it remains open to question the extent to which a military cooperation of this nature is actually possible without Russia's tacit approval.

Turkey also cooperates closely with Ukraine on security policy and continues to do so despite the tightening web of Turkish-Russian relations (Urcosta 2018). This includes, for example, the initiation and development of various weapons development projects in recent years, particularly in the wake of the armed conflicts between Russia and Ukraine. While Ankara denounced Russia's annexation of Crimea, it was careful to ensure that neither the annexation nor the war in the Donbas burdened its own relations with the Kremlin. Turkey did not side with the United States and the EU, particularly with regard to sanctions against Russia. It has been careful to avoid upsetting Moscow in a way that would undermine Turkish-Russian relations.

Maintaining a delicate balance in its relations to Russia and Ukraine is for Turkey a challenge. Only six months after the annexation of Crimea, Ankara, together with Russia, launched the TurkStream gas pipeline project. Ankara supports Kyiv only insofar as doing so does not substantially endanger its own alliance with Moscow. The Turkish Foreign Ministry issued a cautious statement regarding the aforementioned escalation when Russia denied Ukrainian ships access to the Sea of Azov (see 1.2.5): "As a littoral state of the Black Sea, we emphasize that freedom of passage at the Kerch Strait should not be hindered. We urge all parties to refrain from steps endangering regional peace and stability, to respect international law and to act in common sense and restraint to avoid increasing the tensions" (MFA of the Republic of Turkey 2018).

Turkey's purchase and deployment of a Russian S-400 missile-defense system could mark the start of an ongoing intensified military cooperation with Russia – which could ultimately result in sanctions being imposed against Turkey. This would in turn further strain its relations with Western partners and foster its rapprochement with Russia as military ties between the two countries increase. For the EU and NATO, Turkey's acquisition of a Russian air-defense system poses an urgent challenge to security strategy. It has already led to Turkey's exclusion from the F-35 fighter jet program. The United States has halted F-35 training missions for Turkish pilots. As one of the partners in the construction of the Lockheed Martin F-35 aircraft, Turkey should actually receive about one hundred fighter jets.

2.1.4   A shift in policy between strategy and tactical maneuvers

There is no discernably coherent Black Sea strategy on the part of Turkey. The country's defense policy and its stance are currently focused for the most part on its southern borders and the Middle East. The Black Sea and the greater region are a secondary matter for Ankara. As a result of the war in Syria, and its shifting relations with the United States and Russia, Ankara is reshaping its policy in the region. But just as Ankara has rapidly changed its policy vis-à-vis its neighbors, it could easily and quickly shift its focus as well.

There are still a number of Europeans and Americans who continue to see Turkey as an essential partner in their conflict with a newly strengthened Russia. However, the S-400 air-defense agreement, strengthening Turkish-Russian ties in the energy sector, the significant increase in EU-Turkey tensions as well as the deep split between Turkey and EU member states regarding Syria, Libya and Cyprus have undermined the foundations of security cooperation. Turkey's unilateral military operation in northeastern Syria in October 2019 once again highlighted the different perceptions regarding threat and security interests on the part of Turkey and Europe. From Turkey's perspective, the establishment of a Kurd-led politically autonomous region in northern and northeastern Syria is unacceptable, as it fears a long-term threat to Turkish territorial sovereignty in the country's southeast. For the EU, on the other hand, the Kurdish militias are a factor in achieving military and political stability in northern Syria. Having helped combat the so-called Islamic State, the EU envisages their participation in efforts to stabilize the northern and northeastern Syrian border region. Turkey's military incursion into northern and northeastern Syria was not coordinated with the EU and contradicts the EU's strategy, which has relied on Kurdish militias.

It's difficult at this point to predict whether Ankara will turn away from Russia, although the direct military confrontation between Turkish and Russian soldiers in the northwestern Syrian province of Idlib, for example, or the opposing positions of Ankara and Moscow with regard to the inner-Libyan conflict, suggest that such a development is likely. The last few months have made it abundantly clear just how fragile the recently deepened relations between Turkey and Russia are. In the current situation, Turkey seeks to reduce any conflict with Russia which includes, for example, its effort to establish a joint military patrol in Idlib.

2.2   Turkey's energy policy

There are two dimensions to Turkey's energy strategy: first, to ensure its own energy security and second, to signal political neutrality while supporting various gas pipeline projects that run through Turkish territory. Ankara aims to play a key role in the region. However, experts have voiced opposition to Turkey becoming an energy hub because of the limited capacity of its natural gas storage facilities. Natural gas storage facilities play an important role in ensuring the security of supply, for example, in balancing fluctuations in production and consumption. Ankara is in the process of expanding its own gas storage capacity – with loans from the World Bank and the Asian Infrastructure Investment Bank (AIIB). The goal is to have enough storage capacity able to cover at least 20 percent of its own gas requirements. Turkey itself has hardly any resources on its territory and its own production is very low. Turkey has to import more than 70 percent of all the energy it consumes. At 95 percent, its share of total consumption of imported oil and gas is even higher. Given the general instability in the region and the tensions between Ankara and some of its suppliers of gas and oil, this kind of dependency marks a serious structural weakness. Gas supply is also crucial to Turkey's economic growth. Indeed, the rapid growth in energy consumption associated with economic growth means that the security of energy supply has become very important to Turkey in the last two decades. Throughout Turkey's economic boom in the 2000s, annual GDP growth averaged five percent, which led to a significant increase in energy consumption. Electricity generation accounts for the largest share of Turkey's demand for natural gas.

Until recently, imports from Russia covered just over half of Turkey's gas requirements. Energy cooperation between Russia and Turkey began with the Black Sea's first underwater pipeline, Blue Stream. Russia continues to be Turkey's largest energy supplier, but Italy has surpassed Turkey as the second-largest consumer of Russian gas (after Germany). From January to November 2019, Russian gas deliveries to Turkey fell by 38 percent as compared with 2018. In the same period, Azerbaijani deliveries increased by 29 percent and liquefied natural gas (LNG) by 20 percent (Korchemkin 2020; Hürriyet 2019). Turkey has recognized its dependence on Russian gas as a source of vulnerability in the context of a relationship that is subject to shocks. However, some observers attribute the decline in Russian gas imports to Turkey's economic slump. In any case, Turkey's energy security has improved in terms of both demand and supply. First, Ankara re-

duced its share of gas used in electricity generation in favor of coal, renewables and nuclear power (see the end of this section). Second, Ankara diversified its own supply beyond an increase in gas purchases from Azerbaijan, for example, by doubling the number of LNG regasification terminals (to four) and increasing LNG imports. By 2019, Russian gas accounted for only 35 percent of Turkey's gas demand and 9.4 percent of primary energy demand, the latter figure being slightly more than half of what it was in early 2010 (interview with Laurent Ruseckas: April 2020; Turkish Ministry of Energy and Natural Resources n.d.).

Energy has been the most important cornerstone of Turkey's interests in the Black Sea and Caspian region and in Ankara's policy regarding its neighbors. Its own geographical location as a natural bridge between the energy-producing countries of the Middle East or Central Asia and the European consumer countries enables Ankara to pursue a policy of diversifying energy sources and supplies and to play an important role in connecting energy consumers in Europe. One of the main objectives of Turkey's energy agenda is to act as a regional energy hub that makes it possible to deliver exports from, for example, Russia, Azerbaijan, Iraq and Iran to the European market. In addition, the conflicts in Turkey's neighbors to the south are only enhancing the Black Sea and Caspian region's energy potential.

By the early 2000s, four international pipelines had already made Turkey an important transit country, both for the region's energy-exporting countries and for the energy-importing countries in Europe. The Tabriz-Ankara gas pipeline went into operation in 2001, the Russian Blue Stream gas pipeline in 2003, the Baku-Tbilisi-Ceyhan oil pipeline in 2006, and the South Caucasus gas pipeline in 2007. Because these pipelines run through Turkey, it has been able to ensure its own security of natural gas and oil supplies while also strengthening its strategic position vis-à-vis the EU and exporting countries.

More recently, since January 2020, Turkey has also been a transit country for Russian gas supplies to the EU. As part of its 25-year strategy to reduce Russian dependence on Ukraine as a transit country, the Russian state corporation Gazprom began work in 2007 on the South Stream pipeline, which would have had its European landfall in Bulgaria and brought Russian gas from the Black Sea to southern and Central Europe. However, due to non-compliance issues regarding EU regulations, South Stream was scrapped, only to be revived in 2014 as Turkish Stream (TurkStream) with a landfall beyond EU jurisdiction: in Turkey. Currently, TurkStream supplies gas only to Turkey, Bulgaria and Greece but, by the end of 2021, it will be able to supply the Serbian and Hungarian markets and possibly other EU markets as well (as long as the connecting pipelines are developed in accordance with EU regulations).

Turkey is also at the heart of the Southern Gas Corridor (SGC), a pipeline link that brings gas from Azerbaijan to Greece and Italy, without involving Russia. Brussels' efforts to minimize the EU's gas dependency on Russia gives Turkey an essential role in the EU's diversification policy. As a Western bloc ally and member of NATO, the EU has seen Turkey, whose pipelines are far removed from Russian territory, as best suited in geographic terms to transport oil from the Middle East or Central Asia to Europe. The construction of the first non-Russian pipelines (the Baku-Tbilisi-Ceyhan oil pipeline noted above and the South Caucasus gas pipeline) marked a historic turning point. Both pipelines are examples of energy projects that also contribute to a strategic partnership between Turkey, Azerbaijan and Georgia in the Caucasus. The same is true of the Southern Gas Corridor, which connects the South Caucasus pipeline with the Trans-Anatolian gas pipeline Trans-Anatolian Natural Gas Pipeline (TANAP) and the Trans-Adriatic pipeline TAP.

Increasing tensions between the Turkish government and the EU is affecting Ankara's energy-policy efforts in the Black Sea and Caspian region. Recent summit meetings between Turkey and Brussels were primarily aimed at salvaging the fragile agreement between the EU and Turkey from March 18, 2016 (also known as the "Refugee Pact"). In terms of the aspects addressed in this paper – security, energy and the economy – there are no positive developments to report. Less strategic in nature, EU-Turkish cooperation in the energy sector is increasingly focused on individual transactions. In addition, Ankara's efforts to turn Turkey into a regional energy hub has led to a break with its own traditional policy of maintaining its independence. By deciding in 2015 to proceed with the TurkStream pipeline project, Ankara granted Russia an outsized role in the supply of energy. The construction of a second Russian gas pipeline deep below the Black Sea forces Turkey to confront its own contradictions. TurkStream is widely considered to be the main competitor to the Southern Gas Corridor.

Although Turkey has always expressed its commitment to a cooperation with the EU with the Southern Gas Corridor, Ankara has also developed its own political and economic relations with Russia. However, whether Ankara will actually become more dependent on Russia because of the new pipeline is unclear. In any case, Russia has thus far delivered a volume of natural gas that is well below TurkStream's capacity. Within the EU's Energy Community (see 6.2), Turkey is only an observer. But it has also managed to leverage its gas relations with Russia to its benefit. Turkey's energy policy and strategic dependence on Russia will increase, however, once the nuclear-power plant in Akkuyu that is currently under construction by the Russian company Rosatom is completed. From Russia's point of view, these are hardly economically viable plans, as Moscow will thus compete with its own gas supplies.

Turkey's efforts – both in the past and more recently – to serve as an energy hub for European markets, continue to form the basis of a partnership between Ankara and Brussels. It is also consistent with EU efforts to base energy security on a diver- sification of supply sources. However, poor relations between the EU and Turkey, as well as Ankara's deepening relations with Moscow, are bound to make it more difficult for the EU and Tur- key to develop a genuine energy partnership in the longer term.

2.3   Turkish economic policy

From 2002 to 2010, Turkey had one of the fastest-grow- ing economies in the world. This was primarily a result of the deepened integration of the Turkish industry into the EU mar- ket through the framework of the EU-Turkey Customs Union agreement. Integrated into the EU's value chains, the Turk- ish economy experienced economic growth through a de- mand-oriented economic policy. However, the economic situ- ation in Turkey has deteriorated since 2010 due to escalating political tensions within the country and increasingly tense re- lations with the EU.

2.3.1   The attempted coup in 2016 as the turning point for economic decline

Since the failed coup attempt on July 15, 2016, Turkey has been in an economic crisis that was triggered by the event and the subsequent authoritarian policies introduced by the ruling Justice and Development Party (AKP).

However, Turkey had in the years prior already lost sight of its EU accession goal. This was in part due to Turkish domes- tic politics, but was also a factor of EU member states' inabil- ity to resolve political and economic challenges within the EU (e.g., high levels of youth unemployment and high levels of bank debt in the southern member states that were accom- panied by high levels of public debt, as is currently the case in Italy). Larger EU member states, such as France, were increas- ingly opposed to Turkey joining the EU and thus created new obstacles to the integration process. This included, for exam- ple, the blocking of chapters in the accession process. Most re- cently, the accession process as a whole has simply come to a standstill.

Aside from Turkish frustration over the EU's growing indiffer- ence toward Ankara's full membership, it was the reaction of EU leaders to the failed coup attempt in 2016 that brought Turkey-EU relations to a halt. In response to the EU's stance regarding the coup events, the Turkish government moved for- ward with its foreign policy strategy of forging new economic partnerships outside the EU. Unlike Russia and China, EU lead- ers took issue with the official Turkish government line regard- ing who was responsible for the attempted coup and which punitive measures were appropriate. The EU also spoke out against Turkey's prolonged state-of-emergency measures and granted asylum to supporters of the so-called Gülen move- ment, which Ankara holds responsible for the attempted coup.

2.3.2   New economic partners

In addition to the above-mentioned reorientation of its se- curity and energy policies, Turkey also began to shift its eco- nomic policy focus. Since 2016, Ankara has sought with in- creasing enthusiasm closer relations with Russia and China in the Eurasian region. Turkish policy with regard to the Black Sea and Caspian region should also be understood in the context of Ankara's search for new and deeper opportunities for cooper- ation with countries in this region. This includes, for example, Ankara's interest in becoming a member of the EAEU's single market which, in addition to Russia, Belarus and Kazakhstan, has most recently added Armenia and Kyrgyzstan.

In a similar vein, Ankara has in recent years shown a growing in- terest in becoming a member of the Shanghai Cooperation Or- ganization (SCO). The People's Republic of China, the Russian Federation, Kyrgyzstan, Tajikistan and Kazakhstan founded the SCO in 1996 as the "Shanghai Five" group with the goals of building relations of trust, reducing military forces in the bor- der regions and promoting regional cooperation among the member states. After the European Parliament voted unani- mously to suspend accession negotiations with Turkey in 2016, Ankara announced that the government was considering aban- doning its EU membership candidacy in favor of full member- ship in the SCO. In the same year, Turkey was granted the chair- manship of the SCO Energy Club for 2017. This marked Russia

and China's willingness to take advantage of the rocky state of EU-Turkey relations and offer Ankara the route to increased integration into the SCO. Turkey was thus the first country allowed to assume the SCO chairmanship without full membership in the alliance. It currently has the status of an observer in the SCO.

The Turkish government's third economic strategy in the Eurasian region is linked to China's BRI. China is pouring considerable funds into this project that aims, for example, to build modern, international transport facilities such as highways, railway connections and seaports that will connect Asia to Europe (see 5.1). Given its position between Asia and Europe, Turkey has an interest in being involved in China's global initiative. Turkey is also a member of the AIIB which, launched in 2016 and dominated by China, was established as a means of securing financing – beyond direct Chinese investment – for BRI projects. Within the framework of the BRI, Turkey has proposed its "Middle Corridor" to the Chinese government as a new project. This Turkish initiative would be a main arterial within the Chinese initiative vis-à-vis the EU. As such, the Middle Corridor would connect Turkey by rail with Georgia and Azerbaijan, bridge the Caspian Sea and reach China via Turkmenistan and Kazakhstan.

2.3.3   No strategic alternative to the European Single Market

Ankara's increased efforts to develop ties within the structures of the Eurasian Economic Union, the Shanghai Cooperation Organization and the BRI can be explained by the country's political tensions with its Euro-Atlantic partners. From an economic perspective, the key question is to what extent Ankara's new economic ambitions with regard to Eurasia offer Turkey long-term prospects for sustainable economic development.

For example, in 2018, nearly 50 percent of all Turkish exports went to the EU, while only two percent went to Russia. In the same year, Turkey ran a massive trade deficit with China as export revenues totaled $3 billion and imports reached $20 billion. EU-Turkey trade was by contrast balanced with exports to the EU totaling $84 billion. The total EU-Turkey trade volume reached nearly $168 billion in 2018 (World Bank Group 2020).

Moreover, the EU continues to be Turkey's most important foreign direct investor, despite auto manufacturer VW's recent decision to scrap a massive production plant project in Turkey. Ankara had sought in 2019 to persuade the world's largest auto manufacturer to build a new factory in Turkey. Amid concerns over the politically unstable situation in Turkey, the billion-euro project was initially put on hold until June 2020. In the wake of the COVID-19 pandemic and the economic consequences it has unleashed, VW announced in July of 2020 its decision to stop any further plans regarding the plant. Nonetheless, direct investments from Russia and China remain much lower than European direct investment. Furthermore, unlike those coming from Europe, Russian and Chinese investments do not involve innovation-oriented cooperation. Much of Russian investment is focused on the energy sector, and China invests primarily in transport structures and logistics associated with the BRI.

At the time of this writing, it is difficult to assess the tactical or strategic nature of Turkey's economic activities in Eurasia and the Caspian region. Nonetheless, Turkey's search for new economic partners is likely to continue in the context of its uneasy relationships with the EU and the United States.

The EU thus has the means to put pressure on Turkey to deepen its EU ties and continue to act as a NATO partner – as long as Russia and China as potential new partners do not become viable economic alternatives to the European Single Market. More specifically, the EU is in the position to invigorate the Turkish economy by modernizing the existing Customs Union. For the time being, however, a modernization of the EU-Turkey Customs Union has been suspended by the EU in response to the political situation in Turkey, particularly with respect to human rights and the rule of law. Turkey, on the other hand, seems to be increasing its efforts to engage in pragmatic cooperation with states in Eurasia and the Caspian region despite the challenges associated with the security, energy and economic policies of these partner countries which, for example, involve less revenue and no modernization gains for Turkey. Given Turkey's position as a bridge between Europe and Asia, it seems obvious that Ankara will seek to develop cooperation efforts with the EAEU, the SCO and the BRI, particularly at a time when full EU membership is politically unlikely.

3. Iran: Focus on economic survival strategies

3.1 The Black Sea region as a new trade route?

Iran is currently facing massive economic pressure. In addition to chronic internal problems such as corruption and mismanagement, the United States' comprehensive sanctions regime is having a crippling effect on the Iranian market. Existing economic challenges are thus intensifying, leading to a severe economic crisis. Iran is de facto cut off from international trade. Due to "overcompliance" by companies and banks, even non-sanctioned sectors such as food and pharmaceuticals are blocked from entering Iran. The U.S. Treasury Department's Office of Foreign Asset Control procedures for licensing trade with Iran are complicated and lengthy; this makes it difficult for companies doing business with Iran who fear losing access to the U.S. market. Given these circumstances, one primary objective of the Islamic Republic is to develop alternative trade routes shielded from U.S. sanctions. Any sea, land or air route accessible to the country is now of crucial importance, as the country has an urgent need to diversify its trade routes. Many such routes are informal. Indeed, with the country directly bordering a total of 15 other nations, Iran's immediate neighborhood clearly offers many options. Iraq, Turkey and Afghanistan play a particularly important role in this regard, as do the sea routes over the Gulf and the Caspian Sea. The question of who imports and exports which goods, by exactly which route, is today an issue of national security. After all, it is these arteries that function as lifelines to the Iranian economy in times of an actual economic blockade.

In the past, Iran regarded the Black Sea region as being of only secondary importance compared to the Gulf and the Caspian Sea. Developing a rail corridor between Georgia and Iran has

been under consideration for many years. The foreign ministers of the two countries revisited this initiative in 2017. The basic idea at that meeting between Javad Zarif and Mikheil Janelidze was to create a rail connection between the Black Sea and the Gulf. The fact that this approach was not pursued further is likely due both to the insufficiency of investment opportunities and the relative lack of urgency felt by both sides in developing such a route. However, this may change as economic isolation continues to affect Iran. The geostrategic advantages of a corridor between the Black Sea and the Gulf have been widely discussed in Iran, and it can be expected that this debate will gain further momentum and importance as Iran's period of economic blockade continues (Amirahmadian 2017).

The coronavirus pandemic has also revealed Iran's economic dependence on China; despite the outbreak of COVID-19, Tehran maintained air links with China and continued to send and receive delegations to/from the country, which presumably resulted in bringing Iran's "patient zero" into the country. Beginning in January 2020, video messages between Iranian and Chinese citizens could be seen online with unprecedented frequency, first from Iran to China, and then from China back to Iran. This included clips featuring celebrities such as the world-famous actor Jackie Chan, diplomats such as Iran's Foreign Minister Zarif, or sometimes ordinary citizens of one or the other country, preferably children. Messages were also sent through video projections on the Azadi Tower in Tehran. Clearly, there has been a desire in both countries, even beyond political circles, to create a feeling of solidarity.

3.2 Exchange between spheres of influence on the Black Sea and the Gulf?

While located on both the Caspian Sea and the Gulf, with its vital Strait of Hormuz, Iran does not border directly on the Black Sea. The country thus lacks geopolitical influence there. However, current discussions in Iran indicate that policymakers are considering working toward an exchange between these spheres of influence. For example, Iran could pave the way by offering Black Sea littoral states access to the Gulf, obtaining in return access to potential new Black Sea trading routes. The degree to which such a plan would in fact be feasible remains an open question, and it is uncertain which of the Black Sea littoral states might be interested in developing such

a strategy. It is also unclear whether Iran itself feels sufficiently incentivized to approach the Black Sea region in this way. Iran might conclude that it would be more advantageous to focus on the Caspian Sea and the Gulf. Particularly in the Gulf, Tehran is using interference with the freedom of navigation as a political lever to counteract U.S. pressure. The many events in the Gulf in the summer and autumn of 2019, with operations attributable with more or less certainty to Iran, offered striking evidence of this approach. Tehran directly claimed responsibility for shooting down a U.S. drone. In addition, it announced almost ceremoniously that it had seized a British oil tanker. How-

ever, Iran has denied having a role in the attacks on oil tankers or the attacks on Saudi pipelines and refineries. Putting aside the question of accountability, such events show how vulnerable important trade routes are. Tehran has furthermore openly communicated – both through the government and its military apparatus – that the Gulf will not be safe for anyone as long as Iran is no longer allowed to export oil.

But it is unclear as of now whether or not Iran seeks to use its leverage in the Gulf to expand its influence into other strategically important waters. Its potential success will depend on whether Iran can cultivate the necessary interdependencies with the littoral states of the Black Sea. This would require Tehran to demonstrate the trade-policy skills necessary for this purpose, for example by tying the development of the new trade routes so important to the country to the increasingly intensive Turkish-Qatar alliance, offering maritime cooperation in return for access to the Black Sea through Turkey. It remains to be seen whether scenarios of this kind are being considered in Tehran. In this regard, it must also be borne in mind that new trade routes could be opened on an informal basis. After all, it is absolutely necessary to prevent these new routes and the actors involved from being targeted with sanctions, and thus impeded from engaging in trade with Iran. The winners in this complex mosaic of overlapping interests will be those actors who, as black-market intermediaries, smugglers or gatekeepers, can open and utilize the above-described arteries so vital to the survival of the Iranian market. In this sense, informal/illegal trade with highly profitable control centers is already flourishing.

3.3 Security as interdependence

In the current political context, it will be difficult to deter the Islamic Republic from developing and implementing a survival strategy focused first and foremost on its own interests. This means that Iran will utilize actors that conduct military and trade operations with a calculus that differs from that of conventional state actors. Hampered by the sanctions, Iran will use informal routes that enable it to import goods on the sanction list or repatriate income from its exports. These routes will be used by the same actors that Iran today utilizes and deploys within its neighborhood for the purposes of military deterrence. Their task will be to open arteries, and possibly to disrupt or attack the trade of others. The latter capacity is being developed as a means of increasing Iran's own bargaining power. The Iranian logic here is that if the embargo continues, Iran can stop, prevent or otherwise disrupt the trade of other actors – generally with operations that are not clearly attributable. Given the developments in 2019 and the dynamics of the current political context – for example, the January 2020 killing of Qasem Soleimani, head of the Islamic Revolutionary Guard Corps' Quds Force, in Bagdad – it must be assumed that Iran will continue to rely on this strategy and its tactical means. One reason is simply the lack of other alternatives, as negotiations with the United States under the current circumstances, such as Donald Trump's presidency, are not an option for Tehran.

One way out of this situation, which threatens the stability of trade routes in the Middle East, would be a dialogue on the joint regional protection of the trade routes linked to the Black Sea, the Caspian Sea and the Gulf. The volatility of the Gulf region is already perceived as a major security and eco-nomic risk. A situation in which the geopolitical trade interests of the various littoral states were further pitted against one another on a cross-regional basis would mark an unthinkable escalation. With Russia and Turkey in particular being deeply involved in the conflicts of the Middle East, and both perpetually facing the risk of sanctions (or already subject to them), such a scenario cannot be entirely ruled out. It would therefore be advisable to consider possible dialogue formats that address the connectivity of these important trade routes and the associated security implications.

Ensuring the security of these trade routes is without question in the common interest of all littoral states on the bodies of water examined here. Securing these trade routes is, in fact, of interest on a global level, and far beyond the countries of the region alone. Thus, an approach is needed that aggregates the interests of the regional and extra-regional states in a manner that shows precisely how a common strategy for securing the trade routes can be achieved.

Geographically, Iran and Russia are rivals with regard to the exploitation of the Caspian Sea's resources. However, due to the U.S. sanctions and Iran's increasing dependence on Russia and China, Iran cannot afford to make demands on Moscow, for example by claiming the 50 percent share of the Caspian Sea originally assigned to Iran. From a security perspective, Russia's and Iran's interests are currently likely to coincide – with the officially announced goal of preventing conflict in the region. It is unclear how long this state of affairs will last. For example, Iran may at some point come to place a higher priority on its economic interests in the Caspian Sea, emerging as

a more significant rival to Moscow's interests there. However, no indications of this can be seen at the present.

These interests can be defined as (positive) incentives to improve the connectivity between trade routes, or be regarded as collective measures employed to prevent the escalation of an increasingly conflict-ridden rivalry. However, it will not be possible to exclude one or more of the region's states from any such arrangement. Of course, the U.S. sanctions regime against Iran stands in the way of such a regional arrangement. The danger of Iran's continued isolation, however, is that the Islamic Republic, lacking any incentive for negotiations with the United States, might be tempted to act in the Black Sea and Caspian region as it has in the Gulf, thus undermining the security of critical trade routes. Ideally, Iran should not want to develop such a means of exerting pressure in the first place. Therefore, a holistic approach to the protection of trade on the sea routes so important to international and regional commercial traffic would be of fundamental importance.

The current regional situation is characterized by zero-sum thinking and antagonistic rivalry. However, the dangerous consequences of this political climate have become clear – especially given the events in the Gulf region in 2019 – making it evident that a way out of this dynamic must be found.

This is a clear, commonly shared interest, which in turn reveals an immediate interdependence: Either the Black Sea is safe for everyone, or for no one.

It is on this basis that a European policy can and should be developed. As a directly neighboring region, Europe has a much greater ability to speak of shared security interests than does the United States, for example. It must be stressed that Europe is not acting here only as a neutral observer, but rather as a genuine stakeholder with real economic and security interests. This focus on Europe's shared interests with the Black Sea littoral states will render efforts and encouragement in support of regional cooperation more credible.

# 4.	Saudi Arabia: An actor with little strategic interest in the region

## 4.1	Seeking a replacement for the United States – Russia's growing importance

From Saudi Arabia's perspective, the Caspian and Black Sea regions are of only secondary importance. This is true in all areas, whether in relation to security and geopolitical issues, in questions of trade, or with regard to energy supply. For Riyadh, relations with Moscow take the highest priority, as Saudi Arabia is seeking closer engagement with Russia as a potential partner. Moreover, Saudi-Turkish relations have deteriorated significantly in recent years; as a consequence, Riyadh considers the Black Sea region more from the perspective of its bilateral relationships with Russia or Turkey rather than as a region in which it is strategically asserting its own national interests. The potential role played by Iran can also be classified from this perspective. In the context of the general uncertainty regarding the future regional order in the Middle East, Saudi Arabia tends to focus on what it sees as immediate threats to its security.

Riyadh has steadily expanded and strengthened its relations with Moscow in recent years. Through its intervention in Syria, Russia has found a back door that once again gives the Kremlin the power to influence the prevailing order in the Middle East. While Riyadh regards Russian policies as being broadly opportunistic, it has also noticed that Russia's actions have served to enhance its broader geostrategic importance. Given the growing concern about the future role of the United States, Russia has thus gained relevance as far as security issues in the Gulf are concerned. Russia has also emerged as a convenient alternative due to Western countries' increasing criticism of Saudi Arabia's human rights record, and the debates over arms sales to the Kingdom.

Saudi King Salman bin Abdulaziz Al Saud's visit to Moscow in October 2017, the first-ever visit to Russia by a Saudi monarch, led to a number of agreements, for example on investments in agricultural land, logistics and storage in Russian areas on the Black Sea. These are seen as part of the Kingdom's overall food-security strategy. Other investment agreements relate especially to closer strategic links in the energy sector. Vladimir Putin's trip to Saudi Arabia in October 2019 subsequently underscored Moscow's importance to Riyadh. In addition to regional topics such as Iran, Syria and the future order in the Middle East, Russia is of critical importance to Saudi Arabia particularly with regard to energy issues. The world's second and third largest oil producers, who together account for 20 percent of the global market's daily oil production, have in recent years engaged in close dialogue regarding their respective oil-production policies in order to maintain the price of oil at a level satisfactory to both sides. At the end of June 2019, President Putin and Saudi Crown Prince Mohammed bin Salman agreed to extend OPEC-imposed cuts in oil production for another six months, with the goal of ensuring oil-price stability. During the visit of the Crown Prince to Russia, the two sides signed 20 different agreements, including a convention on cooperation between oil-producing states; a protocol on closer cooperation in the energy sector; and an agreement between the Saudi oil company Aramco, the Russian Direct Investment Fund and the Russian Rusnano Group, centering on the purchase of Rusnano shares.

In early December 2019, Russia and Saudi Arabia agreed to reduce oil production further following diplomatic efforts by Saudi Arabia and the United Arab Emirates to win Russia's approval. Riyadh and Moscow also agreed on the formalization of a new OPEC+ charter intended to strengthen Russia's relationship with the organization. With its support for Saudi oil policy within OPEC, as well as the above-cited agreements, Moscow strengthened Riyadh's position and showed itself to be a reliable partner in the energy sector. For Saudi Arabia, these are important signals at a time in which the Kingdom is seeking to expand its strategic relationships.

However, there are limits to the Saudi-Russian energy-sector partnership. This became clear at the beginning of March 2020, when Russia dissolved its three-year agreement with OPEC on the issue of restricted production quantities, arguing that further restrictions would not serve the producing countries' interests, but rather benefit only the American shale oil producers, who could bring their products to market if oil prices remained stable. In response to Moscow's step, Saudi Arabia abandoned its price-defense strategy and announced that it would sharply increase its own production of oil. As a consequence, the price per barrel of crude oil fell to less than $23, the lowest such level since November 2002.

Riyadh's statement that it would dramatically increase its own crude-oil production, however, was more than just an answer to Moscow. Even before the coronavirus pandemic triggered a worldwide economic downturn in the spring of 2020, the global crude-oil market had found itself in a demand crisis. As a result, further production restrictions would have had only a limited, ultimately short-term effect in terms of promoting price stability. Without Russia on board – behind the United States, Saudi Arabia and Russia are the world's second- and third-largest oil

producers – Saudi Arabia is unwilling to accept further reductions in production that would lead to a decline in its income, in part because other oil-producing countries have held only tenuously to previously agreed production quotas. In this context, Moscow and Riyadh are seeking a consolidation of the crude-oil market in which both countries could increase their overall market shares. The intention is to compensate for losses of income through higher production volumes, while pushing so-called high-cost producers – above all the American shale-oil producers – out of the market. The agreement struck on 12 April 2020 between Saudi Arabia, Russia and the other OPEC+ states to reduce oil production quantities by around 10 percent of the daily worldwide production volume does little to change the objectives set by Riyadh and Moscow. This agreement came about only after the United States also agreed to production cuts. Moreover, the oil-producing states will only respect the agreement as long as all states comply with the agreed production volumes. Skepticism is warranted in this regard.

4.2   Attempt to establish a policy focused on Saudi interests

In part due to the tensions over crude-oil production, the expansion of relations with Moscow should not be seen as a change of strategic direction for Saudi foreign policy. For Riyadh, the most critical factor is being able to use whatever influence Russia can exert on countries such as Iran, Syria, Libya and even Yemen. Riyadh is aware that relations with Ankara and Tehran play a more critical role for Moscow than do relations with Riyadh. Nevertheless, it does not want to leave the potential diplomatic and strategic gains entirely to others; thus, Saudi Arabia is trying to fill the vacuum left by the new role of the United States with its own interest-driven politics. From a geopolitical point of view, Russia is no substitute for the United States in the Gulf. But neither can Moscow be ignored.

However, some caution is warranted in connection with this perspective, particularly with regard to the Black Sea region. Saudi investment in areas of the Black Sea region, with the aim of securing wheat imports, for example, should not be seen as an effort by Saudi Arabia to become more deeply involved in the general Black Sea security debates. Although the Kingdom does continue to import wheat from the region, it regards these transactions as primarily commercial. Saudi Arabia also continues to import wheat from other countries, including Australia and countries in North and South America. In addition, the Kingdom is significantly increasing its own wheat production, from 10,000 metric tons in 2017 to 500,000 in 2019, and an expected 700,000 in 2020. This marks a partial step back from a self-imposed ban on wheat production implemented in 2008. A direct result is that the demand for wheat imports has already declined, showing a 17 percent drop in 2019, and an additional nine percent drop in 2020. The announcement by the Saudi Agricultural and Livestock Investment Corporation in November 2019 that it might buy a grain terminal on the Black Sea in order to better coordinate wheat exports from Russia is similarly no indication of a policy change in Riyadh. Saudi Arabia remains determined not to be dependent on the Black Sea region for its wheat imports, a factor that plays a role in the Kingdom's broader security considerations. Wheat imports simply represent an easy and uncomplicated opportunity to expand economic relations with Russia.

Likewise, the role of Islam and religion more generally must be assessed differently today than in even the recent past, at least with regard to Saudi foreign policy toward the Black Sea region. Given the changes in Saudi domestic policy, there is a clear desire to end support for extremist Islamist groups outside the Kingdom, even if some form of continued private financing cannot be excluded. That Saudi Arabia never took a position in support of the Sunni Crimean Tartars was due in part because this population was never receptive to Islamist currents. At best, this was misrepresented by members of former Ukrainian President Yanukovych's Party of the Regions, as well as by later Russian propaganda. Riyadh's neutral stance today applies to (Islamist) groups across the entire region. The Kingdom has performed a 180-degree turn in this regard. Under the Vision 2030 program put forward by the Crown Prince, the project of political Islam as a form of government has been thoroughly rejected. Saudi Arabia subordinates these questions to its prevailing interest in deeper relations with Russia. Another such example is Riyadh's attitude toward the Uighur Muslim minority in China. In order to avoid jeopardizing relations with China, the Saudi crown prince declared in February 2019 that the internment of Uighurs in Chinese camps was a necessary step against extremism and terrorism.

4.3   Tense relations with Turkey

Saudi Arabia's relations with Turkey in the meantime have deteriorated significantly. This is primarily due to the policies pursued by President Erdoğan's government following the Arab Spring of 2011. Since this time, Turkey has sought to expand its own influence in the Middle East, in part at Saudi Arabia's expense. President Erdoğan's attempts in other parts of the Middle East to promote Islamist-based governance forms similar to that of his own AKP party in Turkey have been vehemently rejected by both Saudi Arabia and the United Arab Emirates (UAE) as an interference in the region's internal affairs, and ultimately as being destabilizing. This includes Turkey's support for Egypt's Muslim Brotherhood government under Mohamad Morsi in 2012/2013, as well as Ankara's support for Qatar after Saudi Arabia, the UAE, Bahrain and Egypt declared a boycott against Qatar in June 2017. At the same time, it should not be forgotten that Saudi Arabia supported General el-Sissi and the Salafist al-Nour party as a counterweight to Morsi.

The current low point in relations was sparked by the murder of Saudi journalist Jamal Khashoggi by Saudi state officials in the Saudi Arabian consulate in Istanbul. The Turkish government used the affair to publish embarrassing details, particularly with regard to Saudi Crown Prince Mohammed bin Salman's role in the incident, as a means to maintain pressure on the Saudi royal family. At the end of March 2020, the Turkish state prosecutor brought charges against 20 Saudi citizens, including the Saudi crown prince's former media adviser, Saud bin Abdullah al-Qahtani, and the former deputy chief of Saudi intelligence, Ahmed al-Assiri. From the Saudi point of view, the Khashoggi affair provided an opportunity for President Erdoğan to seek revenge directly against the Saudi ruling family.

Riyadh regards President Erdoğan as pushing a Sunni-Islamist agenda in the context of Turkey's neo-imperialist ambitions, and further sees the country as competing with Saudi Arabia for global Islamist leadership. The Kingdom is convinced that Turkey no longer places a high priority on its relations with the European Union and NATO, and is instead positioning itself as a power broker able to play a decisive role in shaping the future political order in the Middle East. Emblematic of this point of view is Riyadh's conviction that while Turkey still regards Iran as a strategic rival, Ankara is no longer pursuing an antagonistic policy toward Tehran.

Given these developments, it is clear that relations between Saudi Arabia and Turkey will remain tense as long as President Erdoğan is in power. In the current context of the Black Sea region, Saudi Arabia thus gives preference to Russia's policy over that of Turkey. Riyadh will miss no opportunity to take Moscow's side in questions of Turkish influence in the Black Sea region, thus placing as many obstacles in the way of the Turkish president as possible. This in turn hampers Europe's efforts to find a balanced approach to curbing Russia's ambition to shape rules and procedures in the Black Sea region according to Russian preferences. While the Kingdom will not actively pursue its policies on the ground, it cannot be seen as a neutral actor working for greater balance in the region. Because Saudi Arabia no longer has confidence in the United States acting as a protective power in the Gulf (from Riyadh's point of view), Riyadh is seeking alternatives. A destabilization of the military balance in the Black Sea to the detriment of NATO is of secondary importance from Riyadh's perspective, as long as good relations with Russia bring benefits to the Kingdom.

4.4   The limits of Saudi capacity and the role of Iran in the Caspian region

Saudi Arabia's objectives are also to limit Iran's influence within the Caspian region. Because Saudi Arabia sees Iran as the most direct threat to its own security – a view reinforced by the October 2019 attacks on Saudi oil facilities, which were attributed to Iran – the Kingdom is actively seeking to establish relations with countries of the South Caucasus and in Central Asia deemed to be suspicious of Iran's ambitions.

In June 2019, Saudi Foreign Minister Ibrahim Al-Assaf met Georgian Prime Minster Mamuka Bakhtadze in Tbilisi with the goal of expanding and improving bilateral relations between the two countries in several specific areas. Likewise, Azerbaijan and Saudi Arabia have in recent years built a close diplomatic, economic and cultural relationship, culminating in the signing of new economic agreements in September 2019. The year 2019 saw the holding of the fifth meeting of the Azerbaijan-Saudi Arabia Joint Commission on Cooperation, a joint economic forum, and the establishment of a parliamentary friendship group. The Saudi Arabian ambassador in Azerbaijan, Hamad Abdullah Khudair, has stressed that the Kingdom attributes particular importance to the establishment and expansion of its relations with Azerbaijan.

Despite the recent developments at the end of 2019, which indicate a certain willingness on the part of Riyadh and Tehran to engage in dialogue with one another, Saudi Arabia remains de-

termined to contain Iran's expansion in the Middle East and adjoining regions. However, the Kingdom is limiting itself to diplomatic, political and economic measures in this regard, and is not taking any military steps that might trigger additional retaliatory measures such as the attacks on its oil facilities. For now, an approach of de-escalation is preferred – although Riyadh will continue to engage Russia in discussions aimed at increasing pressure on Iran to refrain from further attacks on Saudi territory.

Riyadh therefore has a rather indirect strategy with regard to security issues in the Black Sea. In the Caspian region, the link is more direct, as Saudi Arabia will at least verbally speak out against Iran's attempt to expand and/or consolidate Iranian influence there. However, Riyadh acknowledges that the Caspian Sea lies directly within Iran's sphere of influence. It is therefore unlikely that Riyadh would take steps to challenge Iran actively on its own northern border.

4.5   Reactive instead of proactive: Power shifts in Riyadh's greater neighborhood

From the geopolitical point of view, Saudi Arabia's perception of circumstances in the Black Sea region must primarily be seen in the context of the Kingdom's relations with Russia and Turkey. By contrast, Iran plays only a minor role. Therefore, when weighing the question of how much to foster or strengthen its own relations with Moscow, Ankara or both governments, the Kingdom will primarily use its own security considerations as a yardstick. Currently, given its tense relations with Ankara, Riyadh supports Russia's strategic interpretations with regard to the Black Sea region. However, if relations with Ankara were to improve, Saudi Arabia could momentarily shift to a more nuanced position.

The strategic subordination of the Black Sea region does not mean that Saudi Arabia is staying completely out of the region's geopolitical energy questions. The decision by the Saudi Arkad Group to carry out construction of the Bulgarian portion of the TurkStream gas pipeline, running 474 kilometers to Serbia, underscores Riyadh's willingness to engage economically in this area rather than leaving the field entirely to others.

This project will allow Saudi Arabia to work toward its goal of taking on an active transport (upstream) and processing (downstream) function in the energy sector. However, competition with Iran for spheres of influence within Eastern Europe also plays a role here.

Overall, Saudi Arabia's main focus continues to be its efforts to manage the quickly shifting strategic environment in the Middle East. Riyadh's immediate priorities here are to limit Iran's threat potential, and to build relationships in its direct neighborhood that will contribute to the creation of a more stable environment. Rather than concentrating on the Black Sea region, Riyadh regards the Gulf and the Red Sea as its two highest-priority areas, where it will expend its resources as necessary.

Therefore, Europe cannot expect that Saudi Arabia will play an influential role with regard to the future development of the security situation in the Black Sea region. Indeed, Saudi Arabia is not itself a neutral observer, given the weight that Riyadh currently attributes to Russia.

5. Chinese instead of European integration?

5.1 Belt and Road Initiative on the Black Sea

From the perspective of the People's Republic of China, the region around the Black and Caspian seas primarily plays a role within the context of the BRI. With this project, Beijing wants to integrate the infrastructure of the entire Eurasian continent. The undertaking is of prodigious size and is equally multifaceted. Moreover, it is a project whose contours are becoming increasingly blurred. It has been portrayed in part as a development-aid initiative, but it also in part contains commercial projects, in part pursues political objectives, in part is intended to break through what Beijing perceives as the U.S.-led "containment" of China, and in part represents fervent activity pursued by managers with the goal of impressing superiors with their ability to fulfill and even exceed the plan's objectives, while also obtaining a share of the considerable state funding resources available.

China's Communist Party has been working to cultivate markets for Chinese goods through this comprehensive economic policy initiative since 2013. This accords with the Chinese campaign to include all partnership-based activities under the general Belt and Road umbrella, even if they are traditional trade or commercial investment projects. From Beijing's perspective, all Chinese activities in the Black Sea and Caspian region are embedded within an overall political strategy that has the objective of establishing a geopolitical zone of influence. From the size of the project alone – China indicated in 2017 that it would spend more than $1 trillion on the BRI – it is clear that Beijing has a variety of interests and is pursuing a number of different goals. In addition to the development of infrastructure particularly within Central, South and Southeast Asia, the BRI also serves to propagate Chinese standards internationally in areas such as railroad technology and telecommunications. And because the individual projects are financed using Chinese resources, which are in turn provided and managed by Chinese institutions, the BRI also provides a field of activity for relatively recently created entities with strong Chinese participation such as the Asian Develop-

ment Bank (ADB) and the Asian Infrastructure Investment Bank (AIIB). Indeed, from China's perspective, institutions such as the World Bank and the International Monetary Fund (IMF) serve to perpetuate the dominance of the United States and "the West." The aim is thus to establish precedent for Chinese-dominated parallel structures. Moreover, by acting as a lender and investor in less developed regions – and in the case of infrastructure projects by also contributing technical expertise, machines, engineering talent and often even the project workforce – China is able to exert a multifaceted influence over countries that accept this support. Ultimately, the slowing rate of growth within China itself is one key reason that Chinese companies are marketing their products, services and their enormous overcapacities globally through the BRI.

The region around the Black and Caspian seas is only part of a much broader plan for China. However, as an important link between Asia and Europe, the region is geographically important for Eurasian integration. The sprawling BRI is making a variety of initiatives possible there, including the development of new markets for Chinese goods, the acquisition of economically or strategically interesting local industries, the provision of loans and other forms of support for large infrastructure projects, and even the construction of nuclear-power plants by Chinese state-owned enterprises in Black Sea littoral states belonging to the EU. China's activities thus extend well beyond the construction of roads and bridges, and serve to integrate the target countries into an economic and political pro-Beijing axis. Investments in infrastructure are strategic (including ports, rail lines and energy facilities). Complications for Beijing arise from the sometimes conflicting interests of the region's two other major actors, Russia and Turkey. Precisely because China has its sights for the BRI set on creating a political zone of influence, as well as on simply developing new markets, it is proving difficult to please all potential partners.

5.2 Overlapping and diverging interests from Beijing's perspective

5.2.1 Russia dominates the Chinese-Ukrainian relationship

With regard to Russia, China is pursuing conflict prevention. For example, Beijing has canceled projects in Ukraine that were once ascribed a high priority or is now pursuing them only cautiously. Russia clearly opposes large initiatives that

would facilitate Ukraine's development; from Beijing's perspective, this fact is evidently important enough that China's engagement in Ukraine continues to fall well short of what is possible. In theory, China would have considerable commercial

interest in engaging more deeply in Ukraine, as Ukrainian companies offer benefits in the agricultural, IT, aviation and armaments sectors, for example. Yet despite double-digit growth rates in trade between the two countries, Ukraine plays only a minor role in the BRI and other Chinese diplomatic initiatives, lagging well behind smaller countries such as Serbia and Hungary. In 2017, Ukrainian media reported on major new Sino-Ukrainian projects with a cumulative price tag of around $7 billion. However, these proved to be little more than declarations of intent, which in most cases have not yet been followed up. Moreover, the Russian transit ban on Ukrainian goods, which has been in place since 1 July 2016, means that Ukraine does not play a significant role for the transit of Chinese goods, even though the route through Ukraine is the shortest link between China and the European Union

5.2.2 Divide-and-conquer strategy toward the European Union

China is less conflict-averse toward the European Union. By making investments in poorer EU countries, Beijing is gaining influence and making sure that the EU cannot speak with a single voice in its China policy. Romania and Bulgaria, both of which are Black Sea littoral states and members of the EU, belong to the 17+1 group of Central and Eastern European countries, 12 of which are in the European Union. The "1" here refers to China. China uses this conduit to portray infrastructure projects implemented within the context of the BRI as an alternative to European initiatives that are less ambitious or lacking altogether. Notably, China takes a confrontational approach in positioning its institutional procedures and investment projects, rather than treating them as complementary. One key feature of the Chinese approach is the country's practice of negotiating bilaterally with the governments of individual EU member states rather than with the EU itself. This guarantees that China will be the stronger negotiating partner.

Chinese planners want to build new infrastructure linking Central Europe in particular with the Black and Caspian seas. The aim is to deliver raw materials from Central Asia and goods from China to Germany and beyond via the Romanian port of Constanța and a Danube-Oder-Elbe canal. Implementing these plans would be very expensive; moreover, there are considerable concerns regarding the potential ecological impact. In addition, they compete with the European Union's strategy for the Danube region (European Commission 2010), which provides for more modest canal-construction projects to facilitate shipping in the region.

Although major Chinese projects in the region are often difficult to bring to fruition, Beijing frequently shows itself to be a persistent actor, and is thus in a position to present itself as a credible alternative where the EU is unwilling or unable to invest. In the case of the expansion of the Rovinari coal-fired power plant in southwestern Romania, for example, Chinese sources budgeted investments of around €1 billion; this in turn was to have created around 4,000 jobs. Postponed several times because it did not meet environmental standards, the power plant is today at least partially on the grid. However, it sells the power it generates at below the cost of production. China General Nuclear Power Group (CNG), a Chinese state-owned enterprise, negotiated the construction of new reactors for Romania's Cernavodă nuclear-power plant after the withdrawal of French and German firms (Engie and RWE) from the project. However, the Romanian prime minister has since canceled the collaboration with China, citing the European Green Deal, which the premier indicated should serve as a point of reference for all future Romanian energy projects.

Since 2012, China has organized more than 200 official conferences, summits and working meetings in the context of the 17+1 initiative, as well as numerous non-official meetings. While these serve in part as business events, they also have the goal of identifying voices friendly to China among politicians, academics and journalists. The efforts in this regard range from confidence-building activities to PR campaigns and the establishment of pro-China academic institutions, and in some cases even entail bribery and espionage. To be sure, the official line is that the organization has a business focus, not political intentions. However, the state-funded academic literature that has emerged around the BRI project states that China's engagement is serving to establish a bridgehead in Europe. Within BRI forums, there is talk that China wants to expand its influence. Meanwhile, China accuses the EU of displaying a "Cold War mentality" with its oppositional stance.

To date, China has been more successful in the acquisition of existing infrastructure than in the completion of new projects. The stakes taken by Chinese entities in European ports, particularly in the Mediterranean and Black Sea regions, have provided an impressive example in this regard. According to the OECD, Chinese state-owned enterprises controlled fully 10 percent of all European container-terminal capacity in 2018. This is possible for "national champions" such as China Merchants and Cosco because as long as they meet political requirements, they – like other Chinese firms – have access to low-interest loans from Chinese state banks, which are ultimately subject to political directives. Cosco, which has an equity interest in the port of Piraeus, for example, is also an example of a company whose investments have been supported by BRI-related funds.

5.2.3   Ankara as a sought-after partner

Beijing is increasingly taking note of Turkish rhetoric suggesting that Ankara might cut its ties to the West and reorient its geopolitical alliances. In reality, however, economic cooperation between the two countries is minimal, trailing far behind the continued intensity of European-Turkish relations. In 2018, for example, China's share of foreign direct investment in Turkey was still less than one percent, in comparison to a 61 percent share originating from the European Union. In the same year, only two percent of Turkish foreign trade was with China, as opposed to a 50 percent share with the European Union. Ankara has repeatedly expressed its interest in the BRI. Turkish ministries have developed "action plans" for potential cooperation with China, and the BRI has today carved out a firm presence in Ankara's strategy papers. Yet faced with the fact that the cooperation has not taken a more concrete form, Beijing sees Turkey as lacking any real intention of reorienting its country. Rather, Chinese policymakers suspect, Ankara simply wants to diversify its relationships, with its links to the West retaining a top priority both economically and militarily. For this reason, China is pursuing a rather cautious information policy toward Turkey, leaving Ankara somewhat in the dark with regard to its intentions. From Beijing's point of view, Turkey is making self-confident demands relative to the BRI and potential investment projects, often without being prepared to give anything in return. However, the Turkish Wealth Fund and Sinosure, China's export- and credit-insurance corporation, have signed a memorandum of understanding with the aim of promoting bilateral cooperation in the areas of the economy, trade and investment (Hürriyet 2020a).

In principle, Turkey offers promising opportunities from China's point of view: The geographic location is ideal for China's infrastructural integration of the Eurasian continent. As an emerging country, Turkey also fits in well with China's concept of "South-South cooperation" – that is, cooperation between developing countries, a group to which China officially still belongs – without detours through "the West," against whose dominance this cooperation is directed. In addition, a number of Turkish infrastructure projects – including the Middle Corridor (see 2.3.2); the Kumport container port in Istanbul, in which a state-owned Chinese firm has taken a majority stake; and a third bridge over the Bosporus – already serve as the foundation of what in China's view remains a promising partnership.

5.2.4   Iran as a willing partner in the Middle East?

China's relationship with Iran is wholly different. From Beijing's point of view, this is a country that has no partners, and thus must have every interest in drawing as close as possible to China, while China in turn has no need to fear international rivals within Iran. Accordingly, Beijing found it appropriate when Iran's Foreign Minister Zarif, in a guest column for a Chinese newspaper in 2019, spoke of a "strategic partnership" between the two countries. Given these circumstances, the field should thus be free in Iran for Chinese activities such as the further exploitation of Iranian resources, as well as the development and expansion of the infrastructure necessary for these purposes. For Iran, a partnership with China has the potential to open a viable path out from under U.S. sanctions, while China in turn would gain access to a fully available location in the Middle East. China, however, sees a problem in reconciling this position with its other foreign-policy interests – especially with regard to Israel and Saudi Arabia, but also the United States. In the latter case, this is connected with the question of how far Beijing is willing to push its confrontation with Washington.

5.3.   Geopolitical ambition – Leading world power 2049

For Chinese projects, economic profitability is rarely the decisive criterion. Rather, China is primarily pursuing political and strategic interests. In this regard, economic activities that develop independently of large-scale government-funded projects should be considered separately. The BRI and the 17+1 forum are sometimes overambitious, as in the case of the above-cited idea of linking the Danube, the Adriatic Sea, the Oder and the Elbe with newly created canals. The willingness to invest on this scale, and the fact that profitability is not anticipated, highlights the fact that China is not concerned primarily with business-related interests in projects of this nature. In the Black Sea and Caspian region too, China is pursuing the larger and longer-term goal of creating geopolitical alliances. Given the Communist's Party's grand plan of becoming the leading world power by the 100th anniversary of the founding of the People's Republic in 2049, Beijing is not choosy.

In service of this goal, Beijing is striving to establish the greatest possible range of stable relationships between China and target countries, for example through numerous conferences and forums for academics, journalists, business leaders and politicians, often organized by China in conjunction with the BRI. This has also entailed an increasing presence of Chinese actors in the region, including private companies, state-owned enterprises, and institutions providing the projects with financial and political support. Establishing such a presence on a permanent basis is among the primary objectives of Chinese engagement in the region and could prove to be effective over the long term.

At the same time, China is a newcomer in the Black Sea and Caspian region, and cannot act without restraint. As yet, China's financial and political footprint in the region remains comparatively small. However, it is clear that China has the potential to become an important actor especially on the Black Sea – and that it has already laid the groundwork to develop this potential. If China succeeds with its approach in the European Union of negotiating bilaterally with governments in Central and Eastern Europe, it will become difficult or impossible in the future for Brussels to formulate common goals that touch on Chinese interests. This has been amply demonstrated by the example of Greece where, in 2016, the Syriza government prevented Brussels from warning China to comply with maritime law in its expansion into the South China Sea. At this time, a decision on Chinese investments totaling around $3 billion in the port of Piraeus was imminent, and China's president even referred to the port as the "head of the dragon." A year later, Greece again blocked a joint EU position, this time at the UN Human Rights Council in Geneva. Niklos Kotzias, then Greece's foreign minister, commented: "I respect the fact that the Chinese think differently about human rights. One has to respect this." At that point, Greece was looking for other partners, particularly Russia and China, during the aftershocks of the financial crisis. Similar behavior can also be seen in Serbia and Hungary.

6. The region as energy source, transit zone and hub

6.1 The new energy-policy order after the Soviet Union's collapse

The end of the Soviet Union in 1989 was the beginning of a new surge of activity around the Black and Caspian seas. The South Caucasus states declared independence; Georgia and Azerbaijan pressed ahead with their own independent energy-supply plans. In doing so, they provided the initial spark for a reconfiguration of regional transport structures. Western countries and firms began showing interest in the extensive energy resources of the Caspian Sea. The infrastructure necessary to access international markets had to be built. The United States and European governments promoted the pipeline-based transport of crude oil and natural gas resources from the Caspian Sea basin through Turkey to Europe. Azerbaijan, Georgia, Kazakhstan, Turkey and Uzbekistan came together in 1998, collectively signing the Ankara Declaration. With participation of the United States and a number of companies, they agreed on the construction of the previously mentioned Baku-Tbilisi-Ceyhan oil pipeline from Baku in Azerbaijan through Tbilisi in Georgia to the Turkish Mediterranean port of Ceyhan. The South Caucasus pipeline for natural gas followed a year later (see 2.2) One aspect of Washington's interest in these projects was the desire to trigger political change. Kazakhstan and Uzbekistan's participation demonstrates the interest of the states east of the Caspian Sea in bringing their oil and gas to world markets via the Caucasus rather than through Russia.

Azerbaijan in particular has benefited from this. It has above all been the South Caucasus pipeline, which has delivered natural gas from Baku through Georgia to Erzurum in Turkey since 2007, that has provided for a lasting economic and energy-policy reordering of the Caspian and Black Sea area. The plans for this project were carried out by an international consortium involving significant participation by U.S. and British companies, as well as the State Oil Company of Azerbaijan (SOCAR), an Azerbaijani state-owned enterprise. This was done in coordination with Azerbaijan, the country from which the gas originates, and Georgia, the new pipeline's transit country.

The Russian political situation in the 1990s left Moscow powerless to maintain its hold on its former spheres of influence, especially as the Caucasus was not then seen as an important source of energy resources. After all, Russia already had an established energy infrastructure with Moscow at its center, and used energy as a key instrument of control with which to assert its own economic and political interests among its fellow post-Soviet states. For its part, Turkey took the changed balance of power in its eastern neighborhood as an opportunity to participate in new international projects. The strengthening of the economic environment in Central Asia also offered new development opportunities for the Turkish economy. Azerbaijan saw its chance for independence in its contacts with international energy companies; Georgia also benefited. Armenia's options were limited by its close ties with Russia, its closed border with Turkey and its conflict with Azerbaijan. As a key actor in this constellation, Azerbaijan concluded the so-called Contract of the Century, which enabled Western firms to enter new markets. The development of the Caspian gas and oil sources thus laid the foundation for changes across the entire region. A production sharing agreement facilitated the development of the Azeri-Chirag-Gunashli oil field by 13 companies from eight countries (Azerbaijan, the United States, the United Kingdom, Russia, Turkey, Norway, Japan and Saudi Arabia). The contract also paved the way for an additional 27 agreements with 42 oil companies from 19 countries.

The European Union became actively involved only after the construction of the South Caucasus pipeline. In 2007, it adopted its first Central Asia strategy, with the goal of diversifying supply sources and routes, and thereby improving its energy security (Council of the European Union 2007). However, Brussels was able to achieve this strategic goal only in part; bilateral contacts in the region increased in intensity, but regional cooperation in Central Asia proved elusive, as did any associated economic successes. The international Nabucco consortium of companies from Austria, Germany, Hungary, Turkey, Bulgaria and Romania failed in its goal of bringing Caspian gas to Europe. The pipeline envisioned by the consortium could have filled its proposed volume of 32 million cubic meters only if Turkmenistan had participated in the project. This would have required a crossing of the Caspian Sea – which in turn needed the agreement of the littoral states. This was initially prevented by Russia, together with Iran (see 1.3.2). Another reason for the failure, however, was most likely disagreement within the consortium itself.

The major oil and natural gas pipelines in the Black Sea and Caspian region
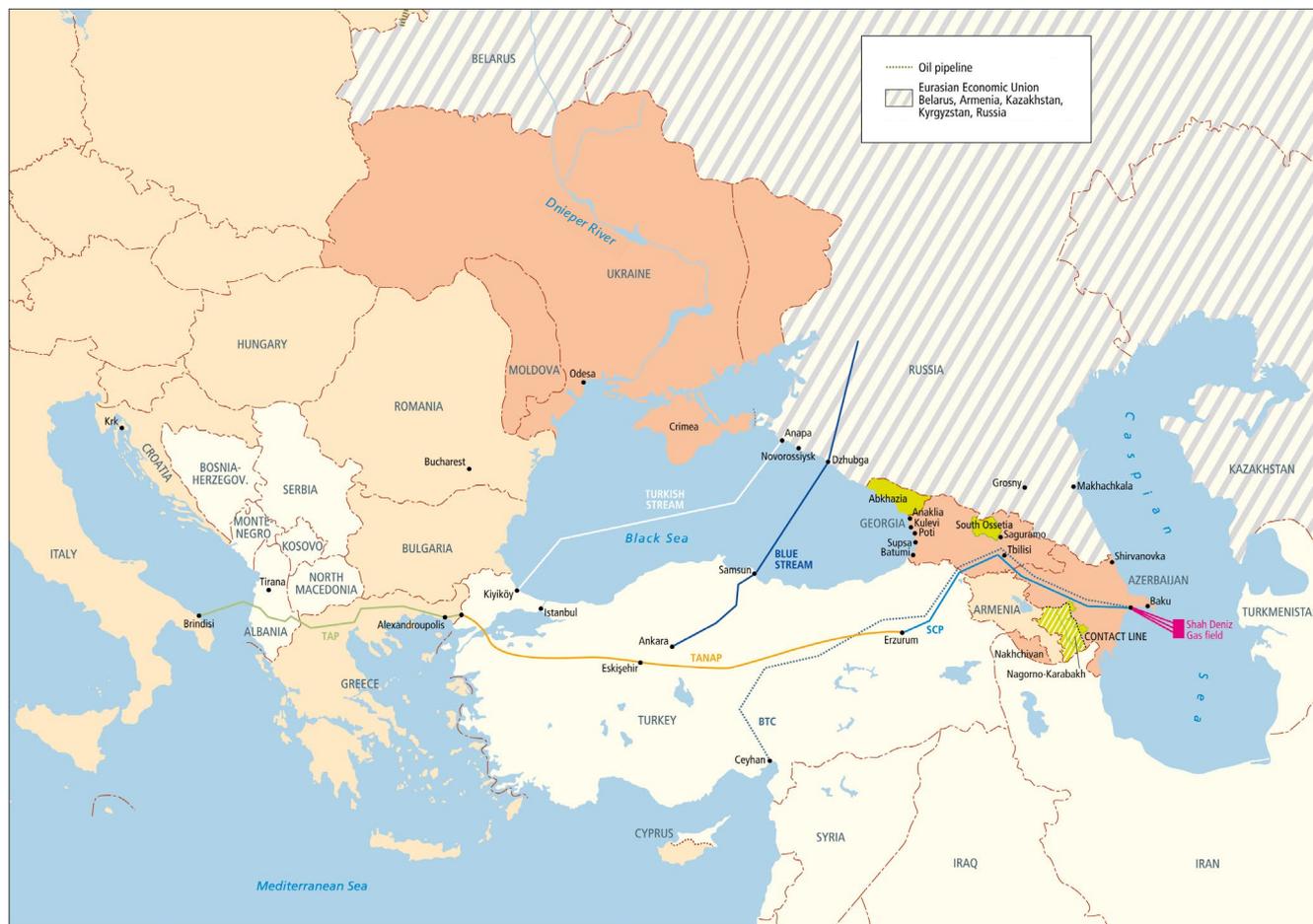
Last update: June 30,2020

6.2 The region's current significance for EU energy policy

Energy is an issue of strategic significance in the region around the Black and Caspian seas. In this context, "energy" refers primarily to natural gas, because oil and coal are easier to transport, and are less politically relevant at the European level. With regard to global oil supplies, political decisions made by Russia and Saudi Arabia influence crude oil prices around the world (see 4.1). However, the specific sources of oil are of little relevance to Europe, as this is a global and highly liquid market. There is rightly little concern about, for example, being too dependent on Russian oil. If Russia wanted to cut off supplies to Europe, it would have much greater impact if the underlying commodity were natural gas. Energy security remains a key issue for the EU's engagement in the region, because it is dependent upon gas supplies from non-EU countries. The natural gas produced within the EU-27 in 2019 covered only 16 percent of the bloc's own demand (excluding supplies from Norway and the smaller quantities from Great Britain). Moreover, the market share of one specific supplier is higher in the eastern reaches of the EU than it is in most other EU countries – referring here to the Russian state-controlled enterprise Gazprom. The need for security of supply thus gave rise to the Southern Gas Corridor project, which consists of 3,500 kilometers of interconnected pipelines running through six countries, designed to transport natural gas from Azerbaijan through Turkey to Greece, Bulgaria and Italy.

Russia's annexation of Crimea marked a turning point for Russian-European gas relations (see 1.2.1). Russian-Ukrainian gas relations – and their impact on Russian-European relations – were high on the European gas agenda in 2019. The close of 2019 marked the sunset of the 2009 contract on the transit of Russian gas through Ukraine, which has been the most important transit state for Russia's natural gas exports to Europe for nearly three decades. Observers feared a gas-supply crisis for countries such as Hungary, Slovakia, Bulgaria, Romania and the Republic of Moldova, much as in early 2009, when Moscow suspended its gas supplies via Ukraine for three weeks while it negotiated with Kyiv. It is a matter of some contention as to whether the crisis feared was averted by the negotiations mediated by the European Commission within the framework of the Energy Community, and led in the crucial last months directly by the German federal government, or by the sanction options discussed in the United States since November, and ultimately included in the U.S. National Defense Authorization Act in mid-December 2019. On 30 December 2019, the presidents of Ukraine and Russia, Volodymyr Zelensky and Vladimir Putin, agreed on new conditions for the transit of natural gas. Gazprom promised Kyiv the transport of natural gas through Ukraine for five more years, with the option of an additional 10 years' extension. However, the transit

volume is lower than before, totaling 65 billion cubic meters in the first year, and only 40 billion cubic meters in the following years. Gazprom's commitment to pay nearly $3 billion to Ukrainian state-owned enterprise Naftogaz on the basis of an international arbitration award concludes the ongoing arbitration proceedings over the 2009 contract. In return, Ukraine waived claims in the tens of billions against Russia. However, the process sparked by the Russian state's seizure of Naftogaz assets in Crimea continues. Ukraine will thus remain an important third party in the gas relations between Russia and the European Union at least until 2024 – although in a significantly more complex political context following Russia's military incursions in Crimea and in eastern Ukraine. The problem of unlawful intervention remains; the gas issue will be addressed separately. Ukraine's future role with regard to Russian gas supplies to the EU remains unclear. The Ukrainian transit system offers flexibility that Gazprom cannot (yet) do without. However, given the pipeline capacity of 120 billion cubic meters, and the significantly reduced gas transit volumes for Ukraine, it will be necessary to consider alternative uses for the Ukrainian gas transport system. In addition, the previous annual transit-related income of around $3 billion, which in 2019 accounted for about 2 percent of Ukraine's GDP, will decline.

6.3   Current dynamics and actors

The key Black Sea littoral state of Turkey is no longer only a national market for natural gas exported from Russia. The startup of the TurkStream pipeline in January 2020 has made Turkey a significant transit country for Russian natural gas supplies to

the European Union. Further east on the Caspian Sea, Azerbaijan is expected to begin exporting natural gas through Turkey to Greece and Italy (and beyond) in late 2020 or early 2021, using the Southern Gas Corridor.

6.3.1   The Southern Gas Corridor (SGC)

The Southern Gas Corridor is both an achievement of EU energy policy and a lesson as to its limitations. Originally, it was based on the Nabucco pipeline project (see 6.1). In 2009, the European Commission created the Caspian Development Corporation. This ambitious initiative was intended as a consortium of gas buyers who would commit to buying gas on Turkmenistan's Caspian coast, and would participate in the construction of a pipeline infrastructure to bring this gas to the European Union – in exchange for financial and institutional support, and the defraying of some amount of risk. The initiative failed, and with it the vision of a large-scale southern gas corridor for Turkmen gas. Some observers blame a lack of commitment on Turkmenistan's part for this outcome, while others point to pressure from Moscow as having been the crucial factor, or a

combination of both. In any case, with EU support, the more modest option has succeeded in diminishing European dependence on Russian gas. The SGC is focused on natural gas from Azerbaijan, which will flow to Europe along the shortest possible path. It consists of several separate energy projects with a total investment volume of around $40 billion. One of these is the $28 billion Shah Deniz 2 natural-gas-field development project in Azerbaijan, carried out by BP and partners including SOCAR, the Azerbaijani state-owned company. This gas field is the starting point for the new gas deliveries to Europe. Azerbaijan and Turkey built the TANAP, which connects to the South Caucasus pipeline in the Turkish region of Erzurum, and can transport gas to Greece, as well as the Trans-Adriatic pipeline, which can transport the gas from the Turkish-Greece

border further to southern Italy. Thus, for the first time, natural gas from Baku will flow all the way to southern Italy. Azerbaijan is thereby achieving its main objective of providing deliveries to the European Union. Bulgaria will be connected to the network via an interconnector. Although the Azerbaijani gas cannot at the moment be seen as an important new source for the EU as a whole (by 2022, it will constitute about 2 percent of the EU's gas supply), the Southern Gas Corridor is an important source for the diversification of the national markets of the EU states. Azerbaijan also has as-yet-untapped gas reserves and could expand its deliveries to Europe in the future. TANAP and TAP were built with an eye toward a possible future expansion that would also keep the dream of bringing Turkmen gas to Europe alive. However, changes in the natural-gas market are at the very least calling this prospect into question (see below, 6.3.3).

6.3.2 Turkish Stream (TurkStream)

This new pipeline constitutes a volatile new element in the complex Turkish-Russian relationship. It is an additional factor that would enable Moscow to bypass Ukraine as a gas transit country. As soon as TurkStream is fully operational, Russia's Gazprom could divert 31.5 billion cubic meters of natural gas to Turkey and toward southern Europe. Each of the two individual lines has a capacity of 15.75 billion cubic meters; one of these is to go toward the Balkans. However, Gazprom will be competing with suppliers using the SGC – as well as with the globally sourced deliveries of liquefied natural gas (LNG). Observers note that the pipeline is a strategic rather than a commercial project for Moscow, referencing a 2018 analysis by Russia's Sberbank forecasting that the investment would not pay off for another 47 years (Schmitt 2020). Some fear that Russia will not be content with TurkStream's existing lines and will in the future seek to replace all of the natural gas flows that are currently passing through Ukraine. Initially, TurkStream was meant to replace the Trans-Balkan Pipeline, which delivered gas from Ukraine to Romania and Bulgaria, into Turkey, and onward to Greece, and whose capacity was expanded in 2003. Built in record time over the course of two and a half years, from May 2017 to November 2019, TurkStream's offshore section was already finished when the United States decided in December 2019 to impose sanctions on all of the specialist firms involved in construction of the offshore components of Nord Stream 2, the latest Baltic Sea gas pipeline between Russia and Germany, which promises to significantly increase the volume of Russia's deliveries. The United States and Russia are competitors in supplying European countries with natural gas. For their part, Ukraine and Poland oppose the TurkStream pipeline because alternative pipelines already run through their countries, and they see a risk to their annual transit incomes. In any case, TurkStream is an experiment following in the wake of Moscow's South Stream prestige energy project, which would have come ashore in Bulgaria. That project failed in 2014 because the EU insisted that it adhere to the rules of the Third Energy Package. This set of regulations was initiated by the European Parliament in 2009 with the goal of further liberalizing electricity and gas markets in the European Union. Its Natural Gas Directive stipulates that the supplier of gas through a pipeline cannot also be the operator of that pipeline, and that third parties must also be granted access to pipelines. In the EU country of Bulgaria, where the pipeline would have come ashore, Boyko Borissov's party won the 2014 parliamentary elections, which made the further construction of the pipeline contingent on Brussels' approval (for more on Bulgaria, see 1.6.1). The EU insisted that a single supplier could not use the entire pipeline, and that some capacity must thus be kept free. It refused to grant Russia's request for an exemption in this regard. The Third Energy Package will also apply to the pipeline connecting to TurkStream on Bulgarian territory. It will be up to the Bulgarian government and the EU to ensure that it is used in accordance with EU law. This will entail monitoring the projects for interconnectors and connection pipelines, as well as procurement procedures and capacities.

6.3.3 Gas vs. gas competition – Liberalization vs. market power beyond the EU?

Even before the effects of COVID-19 pushed global natural gas demand down, a buyer's market for natural gas had emerged that could persist for some time to come. Market conditions may change, but the current situation underlines the EU's fundamentally secure position in terms of its natural-gas supply. The global LNG market entered a period of oversupply at the end of 2018. This is in part because the liberalized EU gas market has emerged as a market of last resort for global LNG over the last 10 years. This has been reflected in lower market prices in Europe for all forms of natural gas. Any current consideration of European energy security must in this regard begin by recognizing the enormous progress made by the EU in 25 years of reform and liberalization of the gas market, particularly since the adoption of the Third Energy Package (European Parliament

2009) and the European energy union framework strategy (European Commission 2015). EU gas liberalization has stimulated the growth of natural-gas-trading platforms and the development of LNG regasification terminals, national monopolies have been broken up, transparency has been created, anti-competitive behavior has been penalized, and the expansion of physical links (interconnectors) between the member states has been encouraged, coupled with natural gas flows in both directions (reverse flow). As a result, most of Europe now benefits from a common, competition-oriented natural-gas market. The goal is to ensure that gas from every delivery point can flow across the EU's internal borders. Once gas has reached the EU's outer border, no single supplier should be able to exert market power or utilize gas as leverage for political influence. This goal has been furthered by a set of binding commitments agreed to by Gazprom, associated with the settlement of a case brought against the company by the EU Directorate-General for Competition (European Commission 2018). However, the rules of the EU's internal gas market alone do not provide a sufficient basis for the countries in the EU neighborhood and the West Balkans to overcome their dependence on Russian gas.

It is at least questionable whether Europe, in the context of its newly defined 2050 climate goals, will in fact need more natural gas than previously assumed due to the increased focus on the expansion of renewable energy. To be sure, natural gas is regarded as the most climate-friendly technical means by which to compensate for natural fluctuations in other energy sources such as wind. However, analyses of even a range of different scenarios indicate that demand is not expected to increase, and that the trend will instead be toward lower gas demand (International Energy Agency 2019). Nevertheless, it must also be borne in mind that European gas production is falling faster than demand, which means that Europe's demand for gas imports will continue to grow for some time. If sup-

ply is deducted manually from demand using the International Energy Agency (IEA) figures, it shows that import demand in 2018 was 340 billion cubic meters; this will rise to 387 billion cubic meters by 2030, and then fall back to 369 billion cubic meters by 2040 ("stated policies" scenario). The "sustainable development" scenario results in even less demand for gas, with 229 billion cubic meters for 2040 (ibid. see figures above).

Experts estimate that it will take until 2040/50 for renewable energy sources to play a significant role in energy supply. Until that time, an alternative is needed, and the cleanest available is natural gas. However, there are now more different sources of gas to choose from. In addition, gas can today be transported across the world's oceans in ships as a movable commodity like oil or coal. Previously, a distance of 3,000 kilometers or more from the source to the consumer served as a threshold for being able to compete with the profitability of pipelines, with sea transport a price-competitive option only for greater distances. However, there has recently been a trend toward the use of LNG even for shorter distances. As the technology has progressed, transportation has become simpler and more cost-effective. However, the plants that stand at the beginning and endpoints of gas shipments, which liquefy the gas and transform it back into gas, are expensive; their profitability depends on how many years they are used, as well as on the price of gas.

Overall, from the EU's point of view, the main objective is to expand the infrastructure for gas and integrate the various networks so that no single country can adversely influence the price of gas. Similarly, this is already the case for the oil market, even though large countries do seek to determine the price through the actions of cartels (OPEC+; Gas Exporting Countries Forum). With further technical developments and fewer constraints on gas transport, the vulnerability with regard to geopolitical risks diminishes.

6.3.4 Individual interests in the region

Georgia has an important role in transport logistics primarily as a strategic partner of Azerbaijan, Turkey and Kazakhstan. It conducts oil and natural gas in pipelines and via rail transport through its territory and on to Turkey. The Georgian ports of Batumi, Kulevi and Poti also ship oil. The port project in Anaklia is new in this regard (see 1.6.3). Georgia also has its own energy resources in the form of hydropower; however, its strategic importance clearly lies in the realm of transit logistics from Asia to Europe.

Although Iran has the world's second-largest natural-gas reserves (surpassed only by those of Russia), Tehran has never

played a major role in European gas-sector discussions. From the EU perspective, Iran has been discussed as a potential gas supplier for the Southern Gas Corridor, but it has remained only a medium-sized supplier for the Turkish market. The country's own underdeveloped infrastructure imposes strict limits on its export capabilities. Currently, Iran is using the entire capacity of its own North-South Pipeline to deliver gas from the south of Iran, where it is produced, to the more densely populated north. Tehran would have to make considerable investments in order to deliver more gas to the Turkish border. If U.S. sanctions were to be lifted, Iran would certainly be able to attract investment in the development of its natural-gas sector.

Indeed, Tehran would urgently need resources from abroad to do so. However, if expanded production capacities were to produce greater quantities of gas, this would more likely be used in support of value-adding industries within Iran, or exported as LNG through the Gulf, than be transported by pipeline through Iran and onward to Europe. To be sure, Iran could theoretically supply Europe via TANAP, but because the Azerbaijani state-owned SOCAR is a 70 percent shareholder in the pipeline, and Turkey has no rules guaranteeing third parties' access, Azerbaijan could prevent this. Above all, however, the shareholders (SOCAR et al.) would first have to invest many hundreds of millions of dollars in the construction of new compressors. The pipeline is in fact dimensioned to be able to transport 30 billion cubic meters per year, but only if new compressors are added. Even the gas-liquefaction plants under construction in the south of Iran, an expensive investment, could only be completed with the support of international donors. In any case, the growing gas market is Asia, not Europe. It should be more advantageous for Iran to produce LNG and focus on Asia – and as necessary, have flexibility with regard to the ultimate point of destination – than to export through pipelines and lock itself into a mature market that is already connected to supply sources via pipelines.

Turkmenistan has the world's fourth-largest gas reserves under its soil, but the country does not currently play a correspondingly significant role. In the past, the question has often been raised as to whether a route to the west could be created through Iran, or via a pipeline through the Caspian Sea. Since the signing of the 2018 Aktau Convention, the sea crossing has no longer been blocked (see 1.3.2). Turkmenistan exports only small quantities of gas to Iran. Larger export volumes are currently going to China, with no appreciable profit for Turkmenistan. Moreover, these are contractually fixed for years.

This is why observers see Turkmenistan as being interested in exporting natural gas to the EU through Azerbaijan; however, they also appreciate that Ashgabat is not in a position to realize this interest alone (see also 1.6.2). It is unclear how the new Russian-Chinese energy relations will affect Turkmenistan (Kantchev 2019). Turkmenistan has also exported oil since 2018 (Trend News Agency 2019). This reaches international markets via tanker ships from Azerbaijan and the Baku-Tbilisi-Ceyhan pipeline.

Kazakhstan has rich reserves of oil, gas and uranium. While it is closely linked with Russia's infrastructure and to the Eurasian Economic Union, the government's multivectoral foreign policy is especially visible in the area of energy policy. Cooperation with Russia is counterpoised to strategic cooperation with Azerbaijan and Georgia; in its cooperation with China in the development of the BRI, Astana gives preference to routes that do not run through Russia. The country exports to Iran, while also making efforts to establish good trade relations with the United States. Similar competing interests are evident in the uranium business, in which Kazakhstan has been the world's largest exporter for more than 10 years. The EAEU imposes some limits, but Kazakhstan is nevertheless seeking opportunities for trade cooperation with the European Union. The Baku-Tbilisi-Ceyhan and South Caucasus pipeline routes and the rail links through the Caucasus are important for Kazakhstan, as are the Black Sea ports that the country additionally uses to export oil. The Kazakh state enterprise KazMunayGas even acquired the oil port in Batumi, Georgia. Overall, Kazakhstan is the fourth-largest provider of oil to the EU. In addition, Kazakhstan has exported crude oil to Iran since 2015; this is transported from the Caspian port of Neka to refineries in Tehran and Tabriz, for domestic use within Iran.

Overview of major oil and natural gas pipelines in the region

NAME	FROM – TO	TRANSPORTS	SINCE	CAPACITY/YEAR	LENGTH	RELEVANCE
Blue Stream	Beregovaya (Russia) – Samsun (Turkey)	Natural gas	2003	16 billion cubic meters	1,213 km	Russia delivers directly to Turkey. Owner and operator: Gazprom. http://www.gazprom.de/projects/blue-stream/ Gazprom (Russia, 50%), Eni (Italy, 50%).
Baku-Tbilisi-Ceyhan (BTC) pipeline	Baku (Azerbaijan) – Tbilisi, (Georgia) – Ceyhan (Turkey)	Oil	2006	30 billion cubic meters	1,768 km	First oil pipeline to open up the corridor from the Caspian Sea to the Mediterranean, serving as an outlet to world markets. https://www.bp.com/en_az/azerbaijan/home/who-we-are/operationsprojects/pipelines/btc.html BP (United Kingdom, 30.1%), AzBTC (Azerbaijan, 25%), Chevron (USA, 8.90%), Equinor (Norway, 8.71%), TPAO (Turkey, 6.53%), Eni (Italy, 5%), Total (France, 5%), ITOCHU (Japan, 3.40%), INPEX (Japan, 2.50%), ExxonMobil (USA, 2.50%), ONGC (BTC) Limited (India, 2.36%).
South Caucasus pipeline (SCP); also known as the BTE pipeline	Baku (Azerbaijan) – Tbilisi, (Georgia) – Erzurum (Turkey)	Natural gas	2007, expanded 2017	< 20 billion cubic meters	691 km	First pipeline to transport natural gas through the South Caucasus to Turkey. https://www.sgc.az/en/project/scp BP (United Kingdom, 28.83%), TPAO (Turkey, 19%), Petronas (Malaysia, 15.5%), SOCAR (Azerbaijan, 10%), Lukoil (Russia, 10%), Naftiran Intertrade Company (NICO, Iran, 10%), SGC (Southern Gas Corridor Closed Joint Stock Company, Azerbaijan, 6.67%).
Trans-Anatolian natural gas pipeline (TANAP)	Erzurum – Turkey/Greece border	Natural gas	Construction began in 2014	31 billion cubic meters	1,850 km	As a connecting pipeline, TANAP links the end of the SCP with the TAP. All three sections together form the Southern Gas Corridor natural gas supply route for the EU. https://www.tanap.com/tanap-project/why-tanap/ SGC (Southern Gas Corridor Closed Joint Stock Company, Azerbaijan, 58%), BOTAS (Turkey, 30%), BP (United Kingdom, 12%).
Trans-Adriatic Pipeline (TAP)	Turkey-Greece border – Brindisi (southern Italy)	Natural gas	Construction began in 2016	10, max. > 20 billion cubic meters	878 km	This pipeline makes up the last section of the southern corridor from Baku to southern Italy and thus to the EU. https://www.tap-ag.com/ BP (United Kingdom, 20%), SOCAR (Azerbaijan, 20%), Snam S.p.A. (Italy, 20%), Fluxys (Belgium, 19%), Enagás (Spain, 16%), Axpo (Switzerland, 5%).
Southern Gas Corridor: SCP – TANAP + TAP	Baku (Azerbaijan) – Turkey – Greece – Bulgaria – Italy	Natural gas	Construction began in 2016; completion expected by the end of 2020	see above	3,500 km	A strategically important natural gas pipeline consisting of three sections that reach from Baku on the Caspian Sea to southern Italy. https://www.sgc.az/en
TurkStream	Anapa (Russia) – Kiyikoy (Western Turkey)	Natural gas	Construction began in 2017; in operation since 2020	16 billion cubic meters	930 km	A geopolitically significant, major pipeline. Russia delivers directly to Turkey and is planning an extension via the Balkans to Austria, which is currently supplied from Russia via Ukraine. Competing markets between Russia and Azerbaijan. https://turkstream.info/project/ Gazprom (Russia), BOTAS (Turkey).

7. Conclusions and recommendations

7.1 Strategic recommendations for EU foreign policy toward the region

Our analysis of the region confirms the assertion that Europe must – in its own interest – pay greater attention to the Black Sea and Caspian region. An expansion of Russian and Chinese influence in this area directly affects the security and economic interests of two EU member states and three NATO partners, each of which border the Black Sea. Although this is of concern to the EU as a whole, Brussels has no comprehensive strategy for the Black Sea and Caspian region with clearly defined foreign economic and geopolitical objectives. As important as it is to connect and integrate the region via new or modernized infrastructure, on its own, the European connectivity strategy does not provide any solutions to the security-policy challenges associated with the region. The question of how the EU intends to respond to the BRI also remains unanswered. Although the flow of funds from the EU to individual countries in the region is significant, Brussels, unlike China and Russia, has yet to leverage investment as a strategic tool.

1. The EU needs a comprehensive strategy for the Black Sea and Caspian region. In order to achieve this objective, the EU should systematize its current initiatives and programs within a strategic framework. Key initiatives and programs are:

   - the Eastern Partnership as part of the European Neighbourhood Policy;

   - the Black Sea Synergy regional cooperation initiative (European Commission 2007);

   - the new Central Asia strategy, which draws on the Council of the European Union's conclusions that were adopted on June 17, 2019;

   - the EU-Asia connectivity strategy, which aims primarily at integrating and connecting the region through infrastructure;

   - the Projects of Common Interest (PCI);

   - projects and planned investments under the Trans-European Networks priority policy, which addresses transport (TEN-T), energy (TEN-E) and telecommunications (TEN-telecom).

2. The EU needs to deliver a clear and effective response to the growing militarization (underway since the Russian annexation of the Crimean Peninsula) of an already conflict-prone region within Europe and along Europe's border, which is also increasingly subject to Chinese influence through its "traditional empire-building efforts" manifest in the BRI (Münkler 2019: 400).

3. The security-policy risks in the region must be addressed with strategic counter-measures that are driven by a concept of "wider security" featuring targeted infrastructural support (e.g., ports, waterways) for EaP-associated states in particular. Deepening their integration through economic and trade-policy interdependence would strengthen their security as well.

4. Responses on the part of the EU, the United States and NATO, respectively, should include both military and economic (sanctions) elements of containment that are closely coordinated. International law and political accords such as the Helsinki Final Act and the Charter of Paris – as well as multilateral organizations – must be defended, and any violations thereof must be clearly identified.

5. In parallel, Russia should be provided opportunities for cooperation in security and confidence-building, arms control, disarmament and, where similar interests apply, regional cooperation (see 7.2 nos. 6 and 7).

6. Supra-regional strategies should be developed for dealing with states in the Russian-led Eurasian Economic Union. Increasingly, some Eurasian states themselves see their situation – wedged as they are between Russia and China – as a threat to security. The EU should therefore treat them as more than commercial partners. In addition, the EU should continue to facilitate the conditions in the region that encourage strategic projects, which includes working together to open up markets and develop solutions to environmental problems.

7. As desirable as certain changes in EU governance architecture may be, such as doing away with the unanimity requirement on foreign policy decisions in the Foreign Affairs Council, such changes are not feasible in the near future. Instead, the European Intervention Initiative (EI2) could be expanded in line with its declared intent to create a

"flexible, non-binding forum" of states that are "able and willing" to protect European security interests (EI2 2018).

8. Appropriate mechanisms are needed in order to keep the UK involved in EU foreign and security-policy initiatives. The EI2 offers a suitable forum for this objective as well. The continued pursuit of the proposed European Security Council could also provide an appropriate forum for the development of such mechanisms.

9. EU policy initiatives that are in line with the EU's bilateral strategies toward Russia, Turkey, Iran and China respectively should be formulated and implemented. Despite diverging interests, the EU should always seek to coordinate its activities in the region with the United States so that both can work toward the same broader objectives.

7.2   Specific recommendations for an effective EU Neighbourhood Policy

The **Eastern Partnership** is the most relevant EU initiative with regard to the Black Sea and Caspian region. Georgia and Ukraine are both partner states in the EaP and border the Black Sea; the Republic of Moldova lies within its catchment area; Azerbaijan borders the Caspian Sea and, together with Armenia, lies within the catchment area of both bodies of water. Regional cooperation initiatives such as the Black Sea Synergy complement the EaP. The EU's strengths continue to have a strong impact in the region. Democracy and political participation, as well as a values-driven political system remain highly attractive objectives across the region as long as they go hand-in-hand with economic prosperity and a functioning government administration. Nevertheless, the EU cannot rely exclusively on the appeal of its own model as a means of defending its interests. It must confront anew the security-policy challenges that – particularly from the standpoint of its associated EaP partners – it has heretofore neglected. Because the EU has only limited means to influence states that have gained in geopolitical influence region such as Russia or China, it needs strong partners in the region. It is within the EU's interest that the EaP countries target the goals of establishing democracies under the rule of law, inclusive economies and resilient societies. It therefore makes sense, as experts have long advocated, to differentiate politically within the EaP. This would involve integrating Georgia, Moldova and Ukraine more deeply into European structures and engaging in closer political cooperation with each, as they are already linked to the EU through association agreements and share with it Deep and Comprehensive Free Trade Areas (hereinafter referred to as the Associated Three/A3). In March of this year, the European Commission and the High Representative of the Union for Foreign Affairs and Security Policy outlined objectives in a joint communication on its Eastern Partnership policy beyond 2020 (European Commission/High Representative 2020). In May, the Council then confirmed in its conclusions regarding the EaP policy the responsibility of participating states to build an "area of democracy, prosperity, stability and increased cooperation based on common values" (Council

of the EU 2020a: 2) while emphasizing "resilience" as an "overriding policy framework" (ibid: 8). Of course, the new targets will not be determined until the next EU-EaP summit, which is scheduled for March 2021. The program outlined in the joint communication sketches the principles and objectives that are important for peaceful cooperation and forward-looking development in the Black Sea region. These include working together for resilient, sustainable and integrated economies, accountable institutions and the rule of law, environmental and climate resilience, and digital transformation. However, the joint communication largely fails to identify any strategic policy objectives for the A3 and limits itself to addressing in rather general terms the unresolved conflicts around the Black Sea. In its conclusions, the Council expresses its concerns and points to the EU's role in various conflict resolution formats but falls short of specifying what a strengthened EU role would involve (ibid: 17). The joint communication also pinpoints "strengthened interconnectivity" as a priority in targeting the "resilient economies" objective, which includes funding **digital infrastructure projects**. It underscores the importance of the EaP countries in connecting Europe and Asia. **Connectivity** is also identified as playing a key role in terms of "wider security." One of the goals is to integrate Georgia and Ukraine as EU-associated countries into transport and energy corridors within the framework of the Blue Economy (Blue Economy – Sea Trade) and thereby strengthen their resilience and security.

Cooperation in the region should continue to be promoted and include Russia. Efforts of this nature could foster confidence-building and thus help reduce tensions. The Black Sea Synergy initiative offers approaches to this end, but its objectives and projects are virtually unknown among the publics of the participating states. As a result, local populations are rarely aware of the benefits of EU-mediated and facilitated regional cooperation efforts. The unresolved conflicts in the region often make it difficult to implement comprehensive projects. Nevertheless, individual components of larger projects could be initiated.

The Eastern Partnership: Strong partners in the Black Sea region

1. The EU should renew its promise of "more for more and less for less" by offering political deliverables and defining its conditions in dialogue with the A3. It's worth examining these countries' shared interest in an EU+3 format for the A3's full access to the EU's "four freedoms": the free movement of goods, services, capital and persons. This kind of distinction could also motivate the other EaP states to demand "more for more" and offer something in return.

2. Security risks should be considered within the context of the EaP. With its economic and institutional soft powers, the EU could – in close coordination with France, Germany and the United Kingdom – contribute more ardently and creatively than before to the gradual resolution of unresolved conflicts in the region.

3. As a bridge between Europe and Asia and a highly cooperative EaP partner country, Georgia is a good place to start in terms of development in the region. The EU, as well as Germany and France, both of which are particularly committed to Georgia's reform process, should work at the highest political level and in close coordination with the United States to complete the deep-sea Anaklia port project in order to strategically improve infrastructure in the region. The EU could encourage Georgia to call for a parliamentary fact-finding inquiry into the circumstances surrounding the government's decision to revoke its contract with the investors of the project. Parliament should be given some oversight of the project in order to minimize the influence of informal decision-making powers on strategic projects of national interest. Linking EU financial support for the second phase of construction to substantial progress in reforms could serve this objective. The EU should emphasize its support for two objectives: (a) an independent judiciary (in particular the transparent appointment of judges to the Supreme Court based on the criteria of professional aptitude, competence and experience) and (b) electoral reform and free and fair parliamentary elections on October 31, 2020.

Enhanced security through connectivity and (digital) infrastructure projects

4. The goal of connectivity needs to be specified more clearly: Criteria for projects in transport and energy should take into account the extent to which such projects contribute to the partner country's security and economic resilience. Key projects involving heavy EU financial investment should be linked to clear timetables and precisely formulated conditionalities regarding the promotion of democracy, good governance and the rule of law. In addition, the EU should maintain high-level monitoring of their implementation and, where possible, involve civil society in the process.

5. Greater interconnectivity between the EU and Black Sea littoral states as well as EaP countries would also ensure that digital infrastructures be taken to the next level. In the joint communication referred to above (European Commission/High Representative 2020), the EU supports roaming and spectrum agreements primarily within the EaP itself and, where "appropriate," between the EaP countries and the EU itself. The EU could exercise greater courage here, as the advantages of closer EU ties – particularly in the digital realm – would deliver more tangible effects for citizens in EaP countries. We recommend the development of a digital package which, in addition to roaming and spectrum agreements (including the elimination of roaming charges) between the EaP states and the EU, provides agreements regarding access to the Single European Payments Area scheme that would initially be offered to the A3 states (as proposed by Delcour et al. 2017).

Strengthening cooperation and synergies in the region

6. The Black Sea Synergy should be used as a platform for developing major infrastructure projects with palpable benefits that people can associate with the EU. In the tourism sector, for example, a project targeting an environmentally sustainable transport ring around the Black Sea could significantly improve connectivity across the region's neighboring countries. This could start with a smaller, initial project linking Turkish, Bulgarian and Romanian transport. Projects of this nature could counteract the widespread feeling in Bulgaria and Romania of standing on the periphery of the EU and, at the same time, bind Turkey more closely to the EU as a strategically relevant partner (interview with Vessela Tcherneva: March 2020). All major projects should focus on strategic objectives and be subject to clear timelines and priority sequencing. They should also be subject to high-level monitoring of reliable implementation.

7. The EU should extend concrete offers to Russia as well. It should also repeatedly communicate to Russia that the country stands to benefit from such measures when it contributes constructively to the resolution of smoldering conflicts in the region that are getting in the way of deepened cooperation. However, a lack of interest on Russia's part should not be an obstacle to Black Sea Synergy projects in the region (ibid.).

8. Individual EU states with close ties to Black Sea countries, such as Germany and France in the context of the Normandy format talks, but also Great Britain, should lead or oversee individual projects and initiatives.

7.3 Specific recommendations in the context of Russia's growing influence in the Black Sea

7.3.1 Security-policy recommendations

Strengthen external security and resilience

Efforts to face these new challenges require close EU-NATO coordination. This is the only way to address Europe's "divided security" problem, namely that countries without NATO membership are not able to defend or guarantee their security.

1. Given the proliferation of conventional and nuclear-tipped Russian short- and medium-ranged missiles in Crimea, NATO should fortify its southeastern flank and, where appropriate, strengthen its own capabilities. The Black Sea region should receive just as much attention as have the Baltic Sea and northeastern Europe regions since 2014. NATO and its member states should enhance the resilience of NATO's neighbors and friends around the Black Sea, just as it has done with the Baltic states. In addition to providing military security, this includes activity with regard to soft security or hybrid threats (e.g., disinformation, cyber attacks).

2. At the same time, NATO should extend offers of cooperation to Russia, including efforts to engage in dialogue on confidence- and security-building measures as well as disarmament and arms control, each with the aim of reducing tensions in the region.

3. In coordination with Ukraine, NATO could also extend offers regarding confidence-building in the Black Sea region. However, mechanisms must be found to ensure that all measures affecting Ukraine's sovereign territory are status-neutral and do not question the fact that under international law, Crimea, as well as Ukrainian maritime areas belonging to Crimea – including the Ukrainian EEZ – are part of Ukraine. As a first step, talks with Russia should be held that address a state's due regard obligations when conducting military activities in the EEZ of another state (as per UNCLOS Art. 87 (2) with regard to other flag states and as per Art. 58 (3) with regard to the coastal state), with the goal of reducing threats in the area. While international experts have developed criteria regarding the proportionality of interference in the rights of other states, agreement on the precise content of such criteria should be vigorously targeted (Lohela and Schatz 2019: 22). SOLAS requirements would also have to be taken into account (see 1.5.7). Agreements on such issues, mentioned here as examples, could stimulate other confidence-building measures, such as the adaptation of the Vienna Document 2011 on Confidence- and Security-Building Measures (OSCE 2011), which the German government has sought.

4. In addition to modernizing the navies of Romania and Bulgaria, an objective that will continue to be promoted within the NATO framework, NATO and its member states could contribute to the goal of secure coastlines by increasing their support to Ukraine and Georgia in building efficient and agile "mosquito fleets" with more in the way of logistics, training and equipment. An effort of this nature should involve more EU and NATO states than before; to date, the development of the Ukrainian navy has involved primarily the United Kingdom and the United States. The goal here is to establish fleets that enable the littoral states to maintain their sovereignty and safety in their own waters. These fleets could also serve to help combat terrorism and smuggling while ensuring environmental protection.

Protecting the freedom of navigation and maritime trade routes

According to the BSISS Monitoring Group, the increased presence of NATO ships in the Black Sea since the annexation of Crimea has had a stabilizing effect in the region. The same can be said of the Ukrainian Navy's activity with escorting ships in the Sea of Azov, which has helped mitigate efforts by the Russian coast guard to detain ships in transit to or from the Ukrainian ports of Mariupol and Berdyansk. However, given the limitations of the Montreux Convention (see 1.6.1), NATO cannot keep this up throughout the entire calendar year. Securing the freedom of navigation and maritime trade routes would require the ongoing presence of NATO ships in the ports and along the coasts of Romania, Bulgaria, Ukraine and Georgia. For Ukraine, the route heading from the Bosporus toward Odesa, which includes the Dnieper-Bug estuary, the Danube delta (Vilkove) and the zone of Russian-occupied gas platforms in the Ukrainian EEZ, is particularly important.

5. NATO and the EU, as well as their individual member states and allied littoral states, should consider monitoring the main trade routes, for example with regular ship patrols. Moreover, they should review various other options for securing trade routes. The medium- to long-term objective should be to have the EU take on a greater share of security-policy responsibility. Several complementary steps are recommended in this regard:

    a) Ukraine's navy could be assisted by NATO and its member states in the acquisition of ships so that it can itself take over a part of the monitoring function. However, as the process of equipping Ukraine to fulfill these functions will necessarily require considerable time and resources, the country will not have the capacities to take on this task for the foreseeable future.

    b) During a transitional period, responsibility for these patrols could be taken over by NATO. Rather than the primary burden falling on the United States, as is currently the case, this task should be shared among a number of member states. Turkey should be closely involved

where possible. It is conceivable, for example, that NATO's presence could be facilitated without having to amend the Montreux Convention if NATO ships were to dock at the ports in Kherson, which lies on the lower Dnieper and is not part of the waters of the Black Sea, and thereby interrupt the 21 days at sea allotted for patrols in the Black Sea. In this way, the presence in the region would be increased without NATO having to leave the Black Sea altogether (Interview with Bohdan Ustymenko: April 2020).

c) The idea of a NATO flotilla should again be taken up with the NATO states of Turkey, Romania and Bulgaria. Also conceivable would be a joint naval structure tasked with ensuring the freedom of navigation that included the NATO Black Sea littoral states as well as Georgia and Ukraine.

d) In parallel, a policy of cooperation between "small navies" is also recommended (Sanders 2020). Initiated and coordinated by the EU and individual member states such as Germany and France, as well as the United Kingdom, Poland and Spain, a maritime presence could be established that from Russia's perspective would be perceived as less confrontational than operations by the United States and/or NATO. This initiative too should include Ukraine and Georgia, and be coordinated with Turkey. Smaller fleets might be better able to cooperate with one another than a NATO flotilla, because the military asymmetry (as in the case of a flotilla with Bulgaria, Romania and Turkey) would be less dramatic, and a number of states could participate on a rotating basis. There is a possibility that countries such as Germany, France and Finland, which are still important to Russia, could lead the way; moreover, several of these nations, especially Finland and Sweden, have many years of naval experience that would be of great use on the Black Sea. Finally, an initiative of this nature would help strengthen the EU's security-policy pillar, while also help expand the burden-sharing between the EU and the United States.

EU monitoring of Black Sea and Sea of Azov hotspots

According to the BSISS Monitoring Group, it was evident during certain periods of 2018 that the EU's increased attention and public statements were a factor in the reduced number of ships on the Sea of Azov being stopped by Russia's FSB. With this experience in mind, the EU should thus engage in a comprehensive monitoring program that promptly publishes

facts regarding violations of international law and of Ukraine's sovereignty, while additionally addressing these issues with Moscow at the highest level. The EU would thus communicate to Moscow that its "soft-pedaled" quest for dominance has not and will not go unnoticed in the international community. Such measures could have a preventive effect but must be main-

tained in order to do so. The situation on the Kerch Strait has not eased in any way (Guchakova, Klymenko and Korbut 2020). The BSISS Monitoring Group is nevertheless the only organization to date that has been monitoring Russia's policy of economic blockade on the Kerch Strait and the Sea of Azov, along with the situation off Ukraine's southern Black Sea coast. If the EU and its member states want to be better prepared for incidents such as the military confrontation that took place in November 2018 (see 1.2.5), they need their own official source of information. Reliable information is a prerequisite to being able to react appropriately and in a timely manner to the region's gathering tensions. The proposal made by Germany's Foreign Minister Heiko Maas after the incident in 2018, to expand the OSCE observer mission in Ukraine into the Sea of Azov in order to ensure free transit through the Kerch Strait, has not yet been taken up, but remains a possibility. However, Russia refuses to accept any permanent on-the-ground monitoring program.

6. It is therefore recommended that the EU establish a distance-monitoring initiative that draws on technologies such as satellites and drones and which could be complemented by the evaluation of officially available navigation data, surveys of ship captains and the use of information available to Ukrainian port authorities. A mission of this nature could be located within the headquarters of the European Union Border Assistance Mission to Moldova and Ukraine in Odesa, as well as in Mariupol, where the EU has maintained a program office since the summer of 2019. The aim would be to continuously monitor the Kerch Strait and the coast of Odesa and Crimea, with a particular focus on the situation around the gas platforms occupied by Russia. Particular attention should be paid to the way in which Russia announces military exercises and allows for marine areas to be "closed off," with an eye to determining whether and to what extent it is violating its duties of consideration and care. This monitoring could be supplemented by regular expeditions to Ukraine's Snake Island not far from the Romanian coast, from which the situation around the Russian-occupied gas platforms and the conditions for navigation within the narrow corridor remaining for transit (see 1.5.5) could be further observed.

EU analysis

In order to acquire a differentiated understanding of the dynamic situation in the Black Sea region, the EU needs – in addition to information gathered through monitoring – reliable information on other aspects of the situation that result from confrontational activities. The Black Sea Institute of Strategic Studies BSISS addresses several of these issues, which include compliance with or violations of sanctions imposed by the EU and the United States on Russia, the impact of such actions, and the socioeconomic situation in Crimea. The EU could expand the basis of these efforts and thereby provide the foundation for an analysis that would allow for the formulation of policy responses that address the challenges described in this paper. A network of this scope could facilitate the monitoring of an EU mission as outlined above by providing expert assessments of the facts gathered and help guide European policy with recommended actions.

7. The EU should consider establishing a long-term joint analysis project focused on the Black Sea situation that involves the BSISS and think tanks based in EU member states as well as Turkey, Georgia and Moldova. The same should be done with regard to human rights organizations that monitor the human rights situation in Crimea.

7.3.2 Recommendations regarding issues relevant to the international law of the sea, public international law and human rights

International law of the sea

This analysis has described a number of Russian patterns of action on the region's seas and waterways. The EU and its member states should address these at the highest level; failing such steps, the international law of the sea would be undermined further in a manner contrary to their own interests. The question of whether Russia is violating Ukraine's rights with regard to the Sea of Azov and the Kerch Strait is significant in view of Moscow's continued policies and actions beyond Ukraine.

1. The EU and/or its member states should address the topic of compliance with international law in the relevant international bodies. In the case of actions by Russia that may

concern SOLAS, this would be the International Maritime Organization (IMO), a U.N. specialized agency; for possible violations of the UNCLOS, this would be the United Nations more broadly.

2. Actions associated with (hybrid) military threats should be addressed in the NATO-Russia Council.

3. The option of seeking proceedings before an arbitration court or the International Tribunal for the Law of the Sea on the basis of the UNCLOS should be considered on a case-by-case basis.

4. The EU should monitor pending court cases in order to broaden the knowledge basis it employs in evaluating political decisions, and to gain familiarity with arguments that may prove useful in future diplomatic negotiations. Particularly important in this regard is the proceeding that has been ongoing since 2016, the Dispute Concerning Coastal State Rights in the Black Sea, Sea of Azov, and Kerch Strait (Ukraine vs. the Russian Federation), as decisions will be made here, based on the UNCLOS, regarding the status of the Sea of Azov and related transit rights (in addition to decisions on the court's jurisdiction in the primary proceeding).

5. If, in the case of an arbitral ruling in favor of Ukraine, Russia seeks to evade the obligations arising from the ruling, the EU and its member states should consider tightening sanctions. Otherwise, there is a risk of a further erosion of the law, as Russia would be encouraged to continue its confrontational behavior.

6. Regardless of any future legal judgment, the EU, Germany and France should continue to urge the Russian Federation to fully respect Ukraine's rights of free transit.

7. EU member states should urge the International Maritime Organization to ensure that the navigation area coordinator engages in stricter oversight of military-maneuver notifications.

Human rights

It is in Germany's and the European Union's interest that the violence that has accompanied the actions described in this analysis, which has threatened stability in their neighborhood, comes to the public eye. Similarly, they have an interest in ensuring that human rights violations do not meet with impunity. In addition, given that Germany and the EU frequently call upon the need to observe and uphold international rules and human rights, raising public awareness of human rights issues in the region would strengthen their credibility with the victims and with the population of the region more broadly. Impunity in cases of serious human rights violations and the forced displacement of populations also bears consequences for security-policy concerns. Finally, international and national organizations, or victims living in Germany, could institute criminal proceedings against high-level representatives of the de facto Crimea administration at the German Attorney General's office; these could be brought on the basis of the principle of universal jurisdiction, which is deemed valid in Germany. Human rights organizations such as the International Partnership of Human Rights (Brussels), in conjunction with Global Diligence (London/Paris) and Ukrainian organizations Truth Hounds and Crimean-SOS, are already working to demonstrate the criminal responsibility of high-level representatives of the de facto authorities in Crimea. They are considering submitting a complaint with Germany's Attorney General's office, as there is precedent within the German legal system for prosecuting human rights violations committed in other countries. In addition, the organiza-tions note, the Attorney General's office has the necessary capacities, while preliminary investigations at the International Criminal Court tend to be protracted. The organizations' goal is to obtain an indictment from the German Attorney General's office against high-level representatives of Crimea and, if possible, European arrest warrants; this is seen as a means of combating impunity for serious human rights violations, and of preventing a return to business as usual in the EU's relations with Moscow (Interview with Simon Papuashvili: May 2020).

1. The EU and its member states should pay attention to cases that are pending or will be filed at the International Criminal Court (ICC) or the International Court of Justice (ICJ) in The Hague regarding serious human rights violations, discrimination against minorities, war crimes or demographic displacements in the course of the annexation of Crimea. This includes the following cases:

a) Proceedings brought before the ICJ by Ukraine on the basis of Russia's violation of the International Convention for the Suppression of the Financing of Terrorism and the International Convention on the Elimination of All Forms of Racial Discrimination (ICJ 2019). In November 2019, the ICJ found that it had jurisdiction in these areas and requested Russia to take immediate action with regard to the second convention. As of the time of writing (May 2020), Russia had as yet failed to do so.

b) A preliminary inquiry launched by the ICC to determine its own jurisdiction with regard to the possible commission of crimes against humanity and war crimes on Ukrainian territory, including the Crimean Peninsula and Donbas (ICC 2016 and 2019).

c) A communication jointly submitted to the ICC by the Regional Center for Human Rights and the Public Prosecutor's Office of the Autonomous Republic of Crimea. This alleges that Russian Federation officials have violated the norms of international humanitarian law, and have perpetrated war crimes and crimes against humanity. It also addresses Russia's responsibility "for the forceful displacement of the population from the territory of occupied Crimea to the Ukrainian mainland" (Interviews with Roman Martinovsky: April and June 2020).

d) The Regional Center for Human Rights and the Public Prosecutor's Office of the Autonomous Republic of Crimea plan to submit another communication to the ICC by the end of the year. Alleged here is the "transfer, directly or indirectly, by the occupying power of parts of its own civilian population into the territory it occupies" (ICC 1998: Article 8 b) viii).

2. The EU and its member states should use the facts brought to light in these proceedings as a basis for assessment in political decision-making, for example with regard to sanctions, in order to counter Moscow's attempts to secure an end to the sanctions without any change in behavior.

3. In the event that proceedings are opened in these last-mentioned cases, the EU, and in particular Germany and France, as proponents of international criminal prosecution, should consider supporting the ICC with infrastructure and personnel; the same applies to German authorities, if proceedings are initiated in Germany under the prinicipal of universal jurisdiction.

4. The EU should consider establishing the position of a European Union special representative for matters relating to the annexed Crimean Peninsula and the occupied areas of Donbas – that is, the areas not controlled by the Kyiv government. A special representative of this nature should engage in ongoing monitoring of the human rights situation in the areas under de facto Russian control and make regular reports to the Council of the European Union and the European Parliament (Center for Civil Liberties 2017).

7.3.3 Non-recognition policy and sanctions

The EU and its member states have underscored their policy of non-recognition with sanctions against Russia that have been continually extended through the present date. Thus, since March 2014, the EU has gradually imposed "restrictive measures against Russia" (sanctions), in response to "the illegal annexation of Crimea and the deliberate destabilization of Ukraine" (General Secretariat of the Council 2020).

The 2014 listings serve as the primary basis for the EU's **sanctions against individuals**. The list of persons and entities "who have committed acts that undermine the territorial integrity, sovereignty and independence of Ukraine" (ibid.) and are therefore subject to EU sanctions (asset freezes and travel restrictions) can be updated (Interview with Anton Korynevych: January 2020). However, there is currently no automatic or regular process of review by the EU. Rather, additions and updates are decided on the initiative of the member states, which has happened a number of times (Council of the EU 2020b). Nevertheless, six years after the annexation of Crimea, it would be useful to introduce a regular and structured procedure that reviews whether changes in the de facto administration of Crimea are being sufficiently taken into account, or whether other institutions should be added. The list should consider positions not only in the administration, the parliament, the government and the Russian Federal Security Service (FSB), but also in the legal system (court and law-enforcement organs), in the military-industrial complex, and in structures bearing responsibility for reprisals against Crimea's civilian population. It should also be examined whether persons transferred from Russia to Crimea for the exercise of these posts should be placed on the sanctions list. The same applies to persons responsible for the occupying power's programs and measures for the transfer of its own civilian population to the occupied territories, as well as persons suspected of having committed war crimes or crimes against humanity.

In addition, given the damages suffered by the Ukrainian economy, the **economic components of the EU sanctions** on Crimea should be strengthened. Merchant ships registered in the Russian ports of Rostov, Temrjuk, Azov, Kavkaz or Novorossiysk, based in Ochamchire in Abkhazia, or which travel to Crimea from there, should be sanctioned. They should be denied services in the ports of EU member states, the United States, the United Kingdom and the states of the Commonwealth of Nations (Interview with Mykhailo Gonchar: May 2020). A continuous and close coordination between the EU and the other

specified countries must be ensured. The example of Abkhazia shows how conflicts are intertwined. In 2010, the de facto Abkhazian government ceded the port of Ochamchire to Moscow; it now serves as a coastal-defense base for the FSB. Russia wanted to export the coal mined in the occupied territories of Donbas through a connected coal port (InformNapalm 2018). At the end of 2015, "Head" of Crimea Sergei Aksyonov and the "prime minister" of Abkhazia, Artur Mikvabija, agreed to deliver building materials and food to Crimea (Vinnik 2015).

Close coordination and joint oversight by the Black Sea littoral states and the EU states are needed to enforce the sanctions. The inclusion of the Russian-occupied Crimean ports on the international sanctions list, and the subsequent ban on merchant vessels heading for Crimea, has significantly reduced the share of foreign (non-Russian) ships in Crimea's overall traffic. However, problems remain, such as an absence of or insufficient oversight by Turkish ports in cases of false destination-port declarations by merchant ships (see also 1.5.6; Klymenko 2019a) that leave from Turkish ports to supply Crimea with (construction) materials important for the local economy (such as the particularly important ilmenite ore, cement and gypsum).

Sanctions against armament companies counteract the rearmament of the Black Sea Fleet and the illegal use of Crimean shipyards by Russia. Russia has been virtually unable, or able only at considerable expense, to find substitutes for key imported military items (see 1.5.3). According to Russian arms experts, the halting of German diesel engine deliveries to Russia, for example, has led to a five-year delay in the construction of battleships (Borovkov 2019). Moreover, the mere threat of sanctions led to a halt in the production of Karakurt-class corvettes at the Russian-occupied "Morje" (Sea) shipyard in Feodosiya, Crimea, and to the transfer of unfinished vessels to a shipyard near St. Petersburg (Guchakova, Klymenko and Korbut 2020: 12-13).

1. The EU and its member states should maintain the policy of non-recognition with regard to the illegal annexation of Crimea and other actions by Russia that violate the territorial integrity, sovereignty and independence of Ukraine.

2. However, the sanctions should be regularly reviewed, with individual components expanded as necessary, due to the progressive militarization of Crimea; the absence of any substantial change in behavior by Russia on the Kerch Strait; the expansion of the occupation in Ukraine's EEZ in the northwestern part of the Black Sea, including the illegal extraction of Ukrainian natural-gas resources; and the ongoing human rights violations in Crimea. By regularly reviewing its sanctions, the EU would at the same time reinforce its policy of non-recognition.

3. Ukraine should ask the Turkish government to introduce strict controls in Turkish ports verifying the accuracy of destination-port declarations made by ships entering the Black Sea, with penalties imposed for violations. The EU could help Ukraine in coordinating similar measures at least with Georgia, Bulgaria and Romania, but at best with all EU states whose merchant ships sail the Black Sea.

4. Russian arms companies and shipyards that design Russian warships for construction at Crimean shipyards, or which lease Crimean shipyards for the construction of these ships, should be made subject to the EU's economic restrictions. The assets of these entities could be frozen, and European companies could be prohibited from all cooperation with the listed Russian firms (ibid.: 12ff.).

5. With regard to the EU sanctions, the braking effect on the rearmament of Crimea has resulted primarily from the EU economic sanctions imposed in July and September 2014; in March 2015, the heads of state and government of EU member states agreed that lifting these sanctions would be made contingent upon the full implementation of the Minsk agreements on the settlement of the conflicts between Russia and Ukraine in eastern Ukraine. These sanctions include a "ban on the export and import of weapons," as well as a "ban on the export of dual-use goods for military purposes or to military end users in Russia" (General Secretariat of the Council 2020). These two bans, a part of the economic sanctions imposed in 2014 and linked with the Minsk Process in 2015, should be retained regardless of the course of the Minsk Process as long as Russia's annexation and militarization of Crimea and the associated destabilization policy in the Black Sea continues, and the environment of repression is not lifted.

6. Finally, it would be useful to establish a central oversight body within the EU that monitors compliance with the sanctions imposed on Russia, and oversees member-state responses in cases when the sanctions regime has been violated by a physical or legal person from that member state. This body should issue regular public reports. Moreover, citizens (such as journalists or NGO representatives) should be given the opportunity to submit information on violations of the EU sanctions regime to the oversight body.

7.4   Specific recommendations to increase resilience in Ukraine

Increasing Ukraine's international and European integration through shipping traffic and foreign investment could, in turn, further disincentivize Russia to disrupt commercial shipping and maritime industries with hybrid attacks. Accomplishing this will necessarily involve **expanding infrastructure and strengthening institutions,** as well as **integrating port and maritime-sector industries into European structures**.

There is currently a lack of coordination and information exchange between the agencies and institutions in Ukraine that are responsible for the overall range of maritime safety issues. This also makes it more difficult to implement security-related or security-policy programs and strategies efficiently.

The economic risks for Ukraine resulting from the tensions with Russia may be even greater in the northwestern portion of the Black Sea, and thus in the EEZ, which is no longer fully accessible to Ukraine, than in the Sea of Azov. This is largely because the country's main export routes run to the Bosporus from the four profitable ports in the northwestern part of the Black Sea (Pivdennyi, Odesa, Mykolaiv and Chornomorsk), as well as from the strategically important port of Kherson on the Dnieper delta. Under the auspices of the Eastern Partnership, the EU is already supporting investments in the ports of Pivdennyi, Chornomorsk, Olvia and Kherson totaling €873 million (Nemetz 2019). Given that the infrastructure of all ports (including those that are profitable) is as much as 70 percent to 90 percent worn out, according to Ukraine's Ministry of Infrastructure, consideration should be given to continuing and intensifying this support.

The Dnieper river is of fundamental importance for Ukraine's export of grain and goods to the Black Sea and the Mediterranean, as well as for the country's food security more generally. It also constitutes the core section of the E 40 main inland waterway, which is listed in the "European Agreement on Main Inland Waterways of International Importance" (UNECE 2018) as providing the following linkages: "Vistula river from Gdansk to Warsaw – Brest – Dnieper-Bug Canal – Pina river – Pinsk – Pripyat river up to the mouth of the – Dnieper river via Kyiv to Kherson." Thus, Ukraine could be linked even more closely to the EU countries of Eastern Central Europe, and the Black Sea/ Baltic Sea connection could be strengthened.

1. The EU could support the renovation of the waterway infrastructure from the Dnieper to the Black Sea, and thus onward to the Bosporus and the Mediterranean, which is of critical security-policy and economic importance to the country. Such support would keep the route functional and expand its potential. The EU could link this assistance to important maritime-sector and port-industry reforms.

2. Due to their vital importance for Ukraine's agricultural and export industries, and thus for the economic growth the country so urgently needs, reforms of the maritime and port industries and the transport sector should be a prominent part of the bilateral European-Ukrainian reform agenda. The EU should attach explicit conditionality to its assistance, supporting both the modernization of Ukraine's port infrastructure and the renewal of the Dnieper internal waterway only if Ukraine takes concrete steps toward reform, and if the EU is able to monitor these in close cooperation with Ukraine's civil society and expert community.

The following recommended steps offer examples of such action (Interviews with Bohdan Ustymenko: April and Mai 2020).

a) Before awarding any concessions, decision-makers should review the feasibility of transferring a port to municipal control, for example if the municipality is able to submit a development plan. Any such action should also be conditional on good municipal governance – that is, the presence of an administration that acts in a transparent and corruption-free manner – as well as on a port's particular importance for the socioeconomic development of (particularly small-sized) port cities and their surrounding areas. The EU could support the Ukrainian government in an advisory capacity in the process of identifying which municipalities are suitable, especially as this issue is closely linked to the overall decentralization reforms in Ukraine in which the EU and Germany in particular are already involved (Bertelsmann Stiftung 2019a).

b) The Ukrainian government intends to mobilize investment for port operations through public-private partnerships and the award of concessions to private individuals. It started this process in 2019/2020, with its preparation of calls for tenders supported by international partners such as the International Finance Corporation and the European Bank for Reconstruction and Development. However, due to the prevalence of corruption in the maritime and port industries, the EU should nonetheless explore whether European representatives could still be sent to serve as members of the relevant oversight commissions in order to ensure the use of transparent procedures (insofar as such measures are not already envisaged).

c) Ukraine should consider adopting a law "On the internal water-transport routes of Ukraine," which would regulate and make transparent the conditions for commercial use of the waterways. In particular, this law should specify the party bearing primary responsibility for funding the renovation of internal waterways (for example, for the urgently needed general overhaul of the Dnieper locks).

d) Ukraine should adopt a law creating a new national commission responsible for carrying out state regulation in the transport sector. In particular, this body should produce a clear and transparent calculation of port charges set in such a way as to maintain the competitiveness of Ukrainian ports.

e) Part of the reform agenda should also be a reform of port management structures, with the goal of producing more transparent, more efficient, and thus profitable port administrations.

3. Ukrainian experts recommend creating an EU-supported joint maritime operations center along the model of the Joint Maritime Operations Centre (JMOC) in Georgia, which has operated successfully for a number of years with support from the United States. A center of this kind could coordinate the work of all organs concerned with the security of navigation and with military, internal and environmental security on the sea. In addition, it could facilitate the exchange of information between national agencies and with partner countries. For example, the Ukrainian center could network with the Georgian JMOC and the future NATO Naval Forces Coordination Center, which has been proposed for establishment in Varna, Bulgaria, by Boyko Borissov (Bohdan Ustymenko and Ukrainian Maritime Expert Platform Association 2020).

7.5   Recommendations for the security of energy supply

The EU is well positioned with regard to the security of its natural-gas supply, as it has been successful both in eliminating unilateral dependences and in opening up a diversity of different sources of supply and transport routes. In addition, the EU's climate policy is focused on a long-term (by 2050) decarbonization. This will gradually reduce the share of fossil fuels in the energy mix. For the near future, however, natural gas will still play a role as the cleanest of these fuels. In addition to more extensive electrification, there is growing interest throughout the European energy sector in a transition from natural gas to hydrogen as a carbon-free energy source. Several alternative hydrogen-based pathways are being researched; however, transforming natural gas into hydrogen through a methane-reforming process, with carbon capture, is currently the most cost-effective solution for large-scale hydrogen production.

With regard to the security of gas supplies, the best advice for European decision-makers is thus to do more of the same: build on the achievements of the last decade, and extend the European internal natural-gas market both to the east and south. At the same time, action must be taken to ensure that member states are in fact implementing the EU rules. For example, since the Law and Justice Party's (PiS) rise to power in Poland, Warsaw has been trying to impose additional obligations on foreign distributors (European Commission 2019a). In Romania, vaguely worded regulations allow the domestic natural gas market to be favored and gas exports to be blocked (European Commission 2019b). Romania is a major natural gas producer and could become a net exporter if new discoveries were to be made off its Black Sea coastline.

1. The national energy markets of individual EU member states should be further integrated into the European internal natural-gas market. For the EU's neighboring countries, the rules and principles of the EU internal energy market should be expanded within the framework of the Energy Community, on the basis of a legally binding framework, for example on cross-border pipeline links and investments, so that a flow of natural gas in both directions can be ensured. In this regard, it is critical that EU directives and regulations are actually implemented both by suppliers and by EU member states, so that the national gas markets are fully integrated into the European internal energy market.

2. Russia's compromise with Ukraine has ensured the transit of Russian gas through Ukraine for the next several years. Over the long term, however, this will also depend on whether Nord Stream 2 capacity can be exhausted. In any case, the use of the Ukrainian pipeline system for the transport of Russian gas beyond 2024 should be encouraged, in part because multiple transport routes are advantageous per se, but also to enhance Ukraine's resilience. To be sure, continuing the transit of gas cannot rule out the possibility that Moscow will expand the military conflict, but it at least makes escalation more difficult. The EU, Germany and Ukraine could enter into an energy dialogue to explore possibilities for the long-term use of the Ukrainian natural-gas transit system and consider the following measures and objectives:

a) The integration of Ukraine as a full and equal member into the EU natural-gas market, as well as the integration of Ukraine's gas-pipeline systems and underground storage capacities into the North-South Corridor of the European natural-gas transit system;

b) The promotion of the use by EU customers of those elements of Ukraine's underground gas-storage system that are located close to the EU border, along with the modernization of these systems;

c) If the market situation so requires, the expansion of the Polish-Ukraine interconnector, today limited to a throughput of 5 billion cubic meters, so as to create pipeline capacity sufficient to allow Ukraine to obtain LNG via the Polish Baltic Sea port of Świnoujście, and to enable gas from EU customers to get to Ukrainian natural-gas storage facilities;

d) The production of hydrogen in Ukraine, as well as its transfer through the Ukrainian gas-transit system to the EU, to create a viable future use for the Ukrainian pipelines, and in order to make a contribution to the implementation of the European Green Deal.

3. The European Commission should apply the rules of the Third Energy Package consistently, for example with regard to the Bulgarian pipeline connection to TurkStream. Rather than leaving it to the courts to ensure that EU law applies, the Commission should always take the principles of European energy solidarity into account, as well as the meaning and purpose of the natural-gas directive of the Third Energy Package. The volumes acquired from different sources should be proportionate. If Greece and Bulgaria are provided with the same degree of good integration that exists for Italy (which connects to the Southern Gas Corridor), for example, a functioning internal energy market could be secured thanks to the diversity of onward distribution routes.

4. The EU can influence the development of the energy sector through its list of Projects of Common Interests (PCI), which is approved and supported by the Commission and the European Parliament.

7.6   EU foreign-policy recommendations with regard to Turkey

Relations between the EU and Turkey have taken on an increasingly transactional character. However, even this pragmatic relationship, marked by tactical actions adapted to each individual situation, is becoming increasingly fraught with conflict.

Security and energy are two of the most important areas of this transactional relationship. In order to develop useful ways forward, it is essential to make realistic assessments and take the dynamics of Turkish domestic policy into account. Turkish policymaking will continue to be shaped by a nationalistic and reactionary politics for some time to come. Examples of this can be found in Ankara's foreign policy in North Syria and off the coast of Cyprus.

In principle, the energy and security interests of the European Union and Turkey coincide. However, if the dialogue between Ankara, the EU and NATO states – particularly the United States – does not improve, and if the war is Syria is not wound down and the security situation on Turkey's southern borders stabilized, Turkey-EU-U.S. relations will remain prone to conflict. Turkey's exploration of new energy sources in the eastern Mediterranean off the coast of Cyprus, as well as the country's political and military engagement in Libya, have added to the tensions. Neither of these issues can be addressed in detail here, however.

Turkey's reorientation toward Russia and China can to a great degree be explained by the lack of political cooperation between the EU and the U.S. on the one hand, and Turkey on the other. At the same time, however, membership in the SCO or the EAEU alongside China or Russia would not be beneficial for Turkey in the long run. Even if Turkey were willing to accept the significant costs of adjustment associated with an economic reorientation toward Russia and China (see the trade and investment statistics cited above), there would inevitably be political tensions with these states as well. China's recent political movements against the Uighur minorities offer a preview of the ethnic tensions that could arise between the two countries. While China is willing to allow Ankara a role in the SCO, the country's top leaders have clearly rejected the prospect of full membership for Tukey in the past. Similarly, Russia's long-term political interests are likely to lead to growing differences of opinion with Ankara, for instance in Georgia or Ukraine, where Turkey has embarked upon military cooperation in part due to the presence of ethnic minorities with a connection to Turkey.

Expanding common energy-sector interests and rebuilding trust

1. Cooperation in the context of the SGC should be used as the basis for a strategic energy partnership between Turkey and the European Union. The EU could rapidly establish a platform for a new SGC cooperation with Turkey, which could potentially also include the eastern Mediterranean as deemed necessary. Underlying this would be a new approach allowing the strategic interests of both actors to be addressed – and which would at least in part help to restore mutual trust. This cooperation would enable Turkey and the EU to realize their respective energy diversification strategies more fully, with each thus improving their own energy policies. This step has the potential to have a positive effect on EU-Turkey relations at a time in which Ankara has lost momentum in the quest for European integration, and has instead turned to Russia and China – even if TurkStream remains a potential source of political strife between the EU and Turkey.

Resumption of cooperation on economic and security issues

2. Over the long term, the EU can have a positive influence on Turkish foreign policy with regard to European policy by offering Ankara a resumption of deeper political cooperation on economic and security matters. Negotiations on the visa liberalization long sought by Turkey or on the modernization of the customs union offer a possible basis for this. However, from the EU point of view, it will be difficult to give new impetus to the visa-liberalization process or the modernization of the customs union as long as civil liberties in Turkey remain restricted, and while Ankara continues to exacerbate tensions in the Mediterranean. Nevertheless, the EU should continue to try to shift its relations with Ankara in a less confrontational direction.

7.7   EU foreign-policy recommendations with regard to Iran

1. The EU should adopt a comprehensive multilateral approach toward Iran on regional policy issues.

   Despite the ongoing problems with implementation of the international nuclear agreement between the EU/E3+3 (the five permanent members of the UN Security Council, Germany and the EU) and Iran, Tehran continues to be open to multilateral approaches that have the objective of regional and cross-regional cooperation. In order to contain or prevent tensions and incidents – such as those witnessed in the Gulf in 2019 – through the medium and long term in the Black Sea region, the EU should establish dialogue platforms enabling the regional stakeholders of the bodies of water discussed in this paper to develop common interests. Iran should be included alongside Saudi Arabia as an influential actor in the Gulf region and be held accountable for its actions. As a preparatory measure, studies should be carried out on a case-by-case basis seeking to identify specific interdependencies and areas in which there is potential for economic cooperation between the littoral states of the various bodies of water (Black Sea, Caspian Sea and the Gulf) as well as with Europe. This approach should go beyond simply describing problems and develop possible incentives for regional cooperation.

2. Incentives for economic cooperation should be provided.

   In its current geopolitical situation, Tehran prioritizes security considerations over economic interests. Trade routes in the immediate vicinity are newly opened and secured on the basis of specific strategic security considerations, with the help of state and/or non-state actors (for example in Iraq, Syria and Afghanistan). But even for Tehran, these trade routes remain insufficiently sustainable. Thus, a European initiative involving the promotion of interstate and cross-regional trade routes between the Black Sea, the Caspian Sea and the Persian Gulf would likely be welcomed in Iran. Ultimately, this could provide a solid foundation for strategic and long-term trade agreements between the littoral states of these three bodies of water – agreements that would generate new incentives for all regional stakeholders to maintain security and protect trade routes. However, a holistic and inclusive approach remains a prerequisite for any such initiative. A starting point in this regard would be discussions on the Track 1.5 level, which on the Iranian side could be elevated to the level of the foreign minister quite swiftly.

7.8   EU foreign-policy recommendations with regard to Saudi Arabia

1. In the context of the February 1989 EU-Gulf Cooperation Council (GCC) cooperation agreement:

   a) The EU should address the policies of the GCC states toward Eastern Europe within the context of its regular political dialogue, with the objectives of creating a common framework for cooperative action and integrating the Arab Gulf states' eastern European initiatives into the framework of overall EU-GCC relations.

   b) At the level of the EU-GCC energy dialogue, an expert group on the issue of EU and GCC energy-sector activities in the Black Sea and Caspian region could be convened, with the goal of discussing common positions and implementing policies in a coordinated manner.

2. It would make sense for the EU to expand its dialogue particularly with Saudi Arabia and the United Arab Emirates, given these countries' current policies toward Turkey and Russia. In this regard, discussions should be carried out at the foreign ministry policy-director level.

7.9   EU foreign-policy recommendations with regard to China

The EU needs a coherent strategy to deal with China's growing presence in Europe and in the Black Sea region. For years, China's government has consistently shown that it will turn economic pressure into political pressure wherever this appears to be both possible and advantageous. The extent of these opportunities will ultimately depend on Europe's strategies and determination.

Of course, there are areas in which European and Chinese interests are complementary. This is true, for example, for tourism in eastern, southeastern and southern Europe. There is no reason not to encourage Chinese investments that are pursuing business interests rather than political goals. At the same time, however, Europe should make sure to pursue its own interests in these European regions, in part by presenting attractive alternatives to Beijing's advances.

1. The more obviously the Chinese government moves along the course of authoritarian state capitalism, the more determined Europe should be in its action. Talking about China's economy also means talking about China's politics. The EU should clearly understand the extent to which China's Communist Party is willing and able to use economic investment as a means of exerting political influence.

2. In order to counteract Beijing's political influence within the EU, the EU should make a "one Europe" principle a requirement for all negotiations with China. This would prevent China from seeking to divide the EU through bilateral negotiations with individual member states.

3. The EU should closely observe the 17+1 cooperation platform in which the Black Sea littoral states of Romania and Bulgaria play an important role and, where possible, offer alternatives that include Georgia and Ukraine. China is monitoring the territorial conflicts in the four member countries of the GUAM Organization for Democracy and Economic Development – Georgia, Ukraine, Azerbaijan and Moldova – especially because the region also contains Turkey, an important country for China's east-west transport of goods. These ongoing tensions have made it hesitant to strengthen its presence in the region.

4. This provides an opportunity for the EU to invest more in infrastructure projects in eastern and southeastern Europe, and to link these strategically to policy goals. To date, large-scale Chinese projects in Romania and Bulgaria have generally been less successful than the partners have hoped. However, it is clear that many countries in eastern and southeastern Europe, as well as in the EU's eastern neighborhood, have an urgent need of infrastructure investment. If the EU is unable or unwilling to make such investments, then these countries will have little choice other than to orient themselves differently.

Abbreviations

A2/AD	Anti-access/area denial
A3	Associated Three
ADB	Asian Development Bank
AIIB	Asian Infrastructure Investment Bank
AIS	Automatic Identification System
AKP	Adalet ve Kalkınma Partisi (Turkish „Justice and Development Party")
BLACK-SEAFOR	Black Sea Naval Cooperation Task Group
BOTAS	Boru Hatları ile Petrol Taşıma Anonim Şirketi (Turkish state-owned oil and gas company)
BP	British Petroleum (oil and gas company)
BRI	Belt and Road Initiative
BSISS	Black Sea Institute of Strategic Studies
BTC	Baku-Tbilisi-Ceyhan Pipeline
C4ADS	Center for Advanced Defense Studies
CGN	China General Nuclear Power Group
COVID-19	Coronavirus Disease 2019
E3+3	European Union plus United States, Russia and China
EAEU	Eurasian Economic Union
EaP	Eastern Partnership
EEZ	Exclusive Economic Zone
FSB	Federalnaja Sluschba Besopasnosti Rossijskoi Federazii (Russian Federal Security Service)
GCC	Gulf Cooperation Council
GNSS	Global Navigation Satellite Systems
GPS	Global Positioning System
GUAM	Organization for Democracy and Economic Development – Georgia, Ukraine, Azerbaijan and Moldova
ICC	International Criminal Court
ICJ	International Court of Justice
IEA	International Energy Agency
IMF	International Monetary Fund
IMO	International Maritime Organization

JMOC	Joint Maritime Operations Centre
LNG	Liquefied natural gas
MG	Monitoring Group
MOL	Magyar Olaj- és Gázipari Részvénytársaság (Hungarian oil and gas company)
NATO	North Atlantic Treaty Organization
OECD	Organization for Economic Co-operation and Development
OPEC	Organization of the Petroleum Exporting Countries
OPEC+	Forum consisting of OPEC countries and external partners
OSCE	Organization for Security and Cooperation in Europe
PCI	Projects of Common Interest
PiS	Prawo i Sprawiedliwość (Polish Law and Justice Party)
PKK	Partiya Karkerên Kurdistanê (Kurdistan Workers' Party)
RWE	German Energy Holding
SCO	Shanghai Cooperation Organization
SCP	South Caucasus Pipeline
SGC	Southern Gas Corridor
SOCAR	State Oil Company of Azerbaijan
SOLAS	Convention for the Safety of Life at Sea
TANAP	Trans-Anatolian Natural Gas Pipeline
TAP	Trans-Adriatic Gas Pipeline
TEN	Trans-European Networks
TEN-E	Trans-European Energy Network
TEN-T	Trans-European Transport Network
TPAO	Türkiye Petrolleri Anonim Ortaklığı (Turkish Petroleum Corporation)
UAE	United Arab Emirates
UN	United Nations
UNCLOS	United Nations Convention on the Law of the Sea

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