



**DIRECTORATE-GENERAL FOR EXTERNAL POLICIES
POLICY DEPARTMENT**



**SECURITY
AND ENERGY SECURITY
IN THE BLACK SEA
REGION**

AFET

DIRECTORATE-GENERAL FOR EXTERNAL POLICIES OF THE UNION

DIRECTORATE B

POLICY DEPARTMENT

STANDARD BRIEFING

**SECURITY AND ENERGY SECURITY
IN THE BLACK SEA REGION**

Abstract

The briefing note examines security and energy security issues around the Black Sea from a regional perspective and assesses the potential of Black Sea cooperation to increase security in the region. It identifies several drivers for change in the Black Sea security environment, including the radical change in relations between Russia and Ukraine under Viktor Yanukovich's presidency, the new Turkish foreign policy, a more active phase in all of the formerly-dubbed 'frozen' conflicts, a renewed focus on naval balance and maritime security and the race for control over the south-eastern route of gas supply into Europe. Threats are grouped into three kinds: those related to competition among the great powers in the region, the potential flashpoints which could at any time trigger a major crisis and the transnational threats and risks that are of concern to all the Black Sea countries (e.g. terrorism, state failure, organised crime).

Regional cooperation can contribute towards containing these threats and risks and transforming the security environment around the Black Sea. The European Union can and should play a more active role in shaping this environment. The fact that the context is fluid and evolving opens up many opportunities for EU initiatives in security issues. For instance, an EU-led initiative for breaking the isolation of the populations of non-recognised territories could contribute to a better regional environment; greater engagement with Russia and Turkey on Black Sea security issues could be further enhanced, and finally, the EU should make an effort to pursue its diversification of gas supply without contributing to tensions in the region.

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EXECUTIVE SUMMARY

The August 2008 Russo-Georgian war was as much a turning point as a clear indicator of deeper trends of transformation of the security environment of the Black Sea region. Since then, some issues such as NATO enlargement have waned in importance, while five factors are now contributing to this transformation with particular intensity. Today, the main drivers for change in the Black Sea security environment are the radical change in relations between Russia and Ukraine under Viktor Yanukovich's presidency, the new Turkish foreign policy and its objective of good relations with the country's neighbours (including Russia), a more active phase in all of the formerly-dubbed 'frozen' conflicts, a renewed focus on naval balance and maritime security and the race for control over the south-eastern route of gas supply into Europe.

In this context, the threats and risks in the region can be grouped into three kinds: those related to competition among the great powers in the region, the potential flashpoints which could at any time trigger a major crisis and the transnational threats and risks that are of concern to all the Black Sea countries. Great power competition marked the last two centuries in the region, but the current context is one of opportunity, yet the trends of growing rivalry are at least as significant as the opportunities for creating a more cooperative environment. As for the potential flashpoints, they are unfortunately numerous, but the likelihood of open confrontation differs greatly from one case to the next. They include Nagorno-Karabakh, several aspects of the Russo-Georgian relationship, Crimea, the growing authoritarian tendencies in the region, Transnistria, instability in the North Caucasus, the race for gas routes, Russia-NATO tensions and the risk of a major crisis in the Middle East. Finally, among the transnational security threats that affect the entire region are terrorism and radical violence, the risk of partial or total state failure, transnational criminal networks and routes, and arms proliferation.

Regional cooperation can contribute towards containing these threats and risks and transforming the security environment. Economic concerns have become a powerful motor for integration and prosperity, and contribute new incentives to deeper regional cooperation. Security might still be too sensitive for overall regional agreements, but there are some specific issues (reactivation of peace processes, containment of the effects of 'frozen' status on everyday life, confidence-building measures, *inter alia*) where agreement should be within reach with enough political will. Turning the focus of energy competition from geopolitics to profit could also improve the environment. One condition for the success of regional cooperation, however, is to avoid exclusions as far as possible.

The European Union can and should play a more active role in shaping the Black Sea security environment. As a full regional player, it should promote cooperation on an equal footing, and refrain from acting as a sponsor as it does, for instance, in the Mediterranean. As a privileged partner of all countries of the region, the EU should use its bilateral relations with each of them, including Russia and Turkey, to contribute towards the emergence of a cooperative security environment in the Black Sea region. Weak statehood and vulnerability to interference and criminal activities are challenges faced by all these countries. EU efforts in ensuring that the projects of reform, state-building and consolidation of the rule of law remain active in all of them will greatly contribute to a more secure regional environment. Ukraine, in a moment of re-definition of its foreign priorities, should find that a helping hand is being held out on the EU side.

The fact that the context is fluid and evolving opens up many opportunities for EU initiatives in security issues. In Transnistria a German-Russian declaration has opened the way for Russian-EU cooperation in contributing towards settling one of the conflicts. The EU should maintain its involvement in Georgia and progressively deflect the many potential crisis points, while also

increasing its role in the Nagorno-Karabakh issue. An EU-led initiative for breaking the isolation of the populations of non-recognised territories could also contribute to a better regional environment. Greater engagement with Russia and Turkey on Black Sea security issues could be further enhanced, for example, by inviting them to participate in more aspects of the Eastern Partnership. Finally, the EU should make an effort to pursue its diversification of gas supply without contributing to tensions in the region – or at least palliate them by means of a more determined focus on promoting a more transparent and norm-abiding environment, and on cooperation regarding other forms of energy, such as nuclear power.

1 INTRODUCTION

The Black Sea region ⁽¹⁾ security environment is evolving rapidly. The August 2008 war in Georgia was at the same time a symptom of the problems that already existed in the region and the beginning of a new context. Exactly two years on, the political and security situation in the Black Sea is changing, but the direction of that change is still not totally clear. The course of events over the coming years will determine whether the new context of rapprochement between some previously competing partners (in particular Russia - Turkey and Russia - Ukraine), flourishing economic links, internal evolution of the countries of the region and change in the big powers' strategies will result in more cooperation and a better security environment, or whether it will lead to its worsening through a realignment of actors, rivalry between powers, a re-activation of protracted conflicts and/or attempts to exclude local and international players from the regional context.

The European Union cannot remain a mere spectator of that evolution. A full regional player since the accession of Romania and Bulgaria in 2007, the EU has a direct interest in a secure environment in the region. Indeed, with its close links to Turkey (a candidate country), its strategic partnership with Russia and the Eastern Partnership, the EU has far closer and better political and trade relations with all non-EU countries of the Black Sea region taken together than any other international actor. The EU is intensively involved in all security issues in the Western Balkans and has acquired a growing profile in the Black Sea area in this domain. This paper analyses the dynamics that are modifying the Black Sea security environment, discusses the potential risks and ways to avoid them through regional cooperation, and suggests some ways in which EU involvement could contribute to a safer environment for all countries involved and for the region as a whole.

2 DRIVERS FOR CHANGE IN BLACK SEA SECURITY

2.1 The New Russo-Ukrainian Relationship and its Implications for the Region

For the European Union, the change of direction brought about by Ukraine since the election of Viktor Yanukovich as president in February 2010 constitutes the most significant recent geopolitical development in the Black Sea region. After five years of confrontation, symbolised by, among other things, the "gas war" and a highly undiplomatic missive from Dmitri Medvedev to his opposite number Viktor Yushchenko in August 2009, the two countries have decided to turn the page.

The agreement reached in Kharkov on April 21 illustrates the spectacular reinforcement of bilateral ties. Two of the main sources of dispute between the two countries – the Black Sea fleet and gas – have been resolved. Russia has been granted an extension until 2042 of its authorisation to station its Black Sea fleet in Sebastopol, whereas, under the terms of the bilateral treaty of 1997, it was due to withdraw in 2017. In return, Russia has given Ukraine an immediately applicable 30% reduction (with some exceptions) in the price of gas sold by Gazprom to Naftogaz Ukrainy over the next 10 years.

The Kharkov agreement represents a major geopolitical victory for Russia. The prospect of Ukraine joining NATO, which had already become very hypothetical following the Bucharest summit of April

¹ There is no universally agreed definition of what countries constitute the Black Sea region. Beyond the obvious choice of restricting it to the littoral countries (i.e. Bulgaria, Romania, Ukraine, Russia, Georgia and Turkey), there are several interpretations of how far the region extends. In the EU definition the region includes, in addition to the six littoral states, Armenia, Azerbaijan, Georgia and Moldova.

2008, is now non-existent. This is even more the case since the *Verkhovna Rada*, the Parliament, adopted a government-sponsored bill setting out the foundations of domestic and foreign policy which clearly confirms the country's "non-bloc" status. This "Finlandisation" of the Ukraine has been welcomed with relief in Moscow but has stirred up controversy in Kiev.

The realignment of Ukrainian foreign policy can also be seen in the support of the Ukrainian government for Russia's proposals for a new European security architecture, as formulated by Dmitri Medvedev in Berlin in June 2008. This represents a major success for the Russian presidency since Ukrainian foreign policy, even during the "multivectorial" period under Leonid Kuchma, had, until this point, always avoided involvement in Russian initiatives in the field of European security. At the regional level, a *de facto* withdrawal of the Ukraine from the GUAM/ODED⁽²⁾ has already been effected. Viktor Yanukovich's election has put an end to the privileged partnership between Ukraine and Mikheil Saakashvili's Georgia. It also means an alignment of Ukraine's positions with those of Russia in the Transnistrian conflict, as illustrated by the joint declaration made by Viktor Yanukovich and Dmitri Medvedev in Kiev in May.

On the eve of the twentieth anniversary of the collapse of the USSR, therefore, we are seeing a major shift in the Eastern Europe and the Black Sea regions. Plans to uncouple Ukraine from Russia for geopolitical reasons, backed from 1994 onwards by the Clinton and Bush administrations, have failed. Ukraine no longer sees itself as the advance guard of a strategy of *containment* and is giving priority from now on to peaceful relations with its northern neighbour. Its room for manoeuvre has notably shrunk as a result of the economic crisis and the absence of tangible prospects of integration with the West. It would nevertheless be premature to conclude that Ukraine has swung over completely into Russia's sphere of influence. Closer relations with the European Union and an agreement of association remain fundamental for Ukraine. Viktor Yanukovich's visit to Washington earlier this year and Hillary Clinton's visit to Ukraine this summer indicate that neither of the two protagonists wants to sacrifice its relations with the other in the name of a privileged partnership with Russia. The normalisation of relations with Russia these last few months should not be allowed to camouflage the stumbling blocks still besetting bilateral relations. Ukraine has reiterated that there can be no question of its joining the Russia-Kazakhstan-Belarus customs union or the Collective Security Treaty Organisation, and Russian attempts to gain control of important parts of the Ukrainian economy are being vigorously resisted.

2.2 The Impact of Turkey's New Foreign Policy

The signs that Turkish foreign policy has changed considerably in the last decade are well known and not restricted to the most visible decisions in the Middle East such as the denial of support to the American-led invasion of Iraq, the deterioration of relations with Israel in the Gaza flotilla crisis, or the Turco-Brazilian nuclear deal with Teheran. In the Black Sea regional context, the 'zero-problems with neighbours' policy advocated earlier and now implemented by foreign minister Ahmet Davutoglu has radically transformed relations with some countries like Greece or Syria, although it still faces challenges in Cyprus or Armenia. The outstanding issues of Northern Cyprus, Nagorno-Karabakh and transborder links of the Kurdish PKK guerrilla movement seriously constrain Turkish attempts to reset relations with the countries in its surroundings.

2 GUAM is a regional organisation created by Georgia, Ukraine, Moldova and Azerbaijan (hence the acronym GUAM) as a counterweight to Russian regional hegemony. The organisation is also known as ODED, the Organisation for Democracy and Economic Development.

Russo-Turkish relations, which are playing an increasingly determining role in the strategic balance of the Black Sea region, have long been under-estimated by European and American observers. Historically complex, they began to evolve at the end of the 1990s. The Primakov government's withdrawal of support for the PKK leader Abulah Oçalan dissipated most of Turkey's traditional reservations about Russia. At this point, a new partnership was forged and has been systematically strengthened since then. This partnership today takes in sensitive economic matters and has a political dimension, particularly in the southern Caucasus, which could have a direct impact on the interests of the European Union.

Energy questions give the measure of the increasing density and changing nature of relations between the two countries. The Rosatom subsidiary Atomstroyexport is to build Turkey's first nuclear power station at an expected cost of \$10bn. In October 2009, several Russian state companies, including Transneft and Rosneft, signed an agreement to participate in the Samsun-Ceyhan oil pipeline project, and Turkey will most likely support the Russian South Stream project.

At the political level, one can see a growing complicity which might be described as "the temptation of condominium". Despite their historically difficult relations and certain persistent strategic divergences, Russians and Turks consider themselves to be legitimate powers in the Black Sea region and the Caucasus – which they do not necessarily see as being the case for the European Union and the United States. Turkey's rejection of a reinforcement of the presence and activity of NATO naval forces in the Black Sea region can also be explained by its concern to keep regional matters in the family, a preoccupation which it shares with Russia. Its initiatives after the "five-day war" between Russia and Georgia bear witness to this wish to limit the presence of outside parties. In particular the proposal for a 'Caucasus Stability and Cooperation Platform' deliberately excluded not only the EU and the US, but also another uncomfortable regional player, Iran (to the chagrin of Armenia, which sees it as a useful counterbalance for both Russia and Turkey).

The active participation of BOTAS, Turkey's state-owned oil and gas company, in the Nabucco project and the recent tensions between Yerevan and Ankara recall that the interests of Russia and Turkey are far from being identical. The fact remains, nevertheless, that the emerging axis between these two former empires, both conscious of their history, and maintaining love-hate relations with Europe, constitutes one of the main challenges which the European Union may have to face in the Black Sea region in the years to come.

2.3 Unfrozen Conflicts: New Dynamism

The August 2008 war reminded the entire world of the ongoing conflicts in the wider Black Sea region. Although the conflicts over the division of Cyprus and Kosovo's contested independence affect the region and concern its actors, conflicts of the post-Soviet space are much more directly related to Black Sea security. Some of them have never seen an active armed phase, such as the conflict over the status of Crimea; others, despite their violent nature, never became fully internationalised (such as the two Chechen wars or the Ossetian-Ingush conflict). Nevertheless, four of them remain problematic after a military phase in the 1990s and have resulted in four self-proclaimed, partially- or non-recognised states: Transnistria, Abkhazia, South Ossetia and Nagorno-Karabakh.

The war and the Russian recognition of the independence of South Ossetia and Abkhazia was the ultimate confirmation that legal and political norms and agreements that had so far served to maintain a precarious *status quo* are no longer respected by regional actors. Peace-keeping missions and 'internal security' operations have been discredited and delegitimised. This is not solely the result

of war, but also of the prior escalation of diplomatic and military moves by both Georgia and Russia to reassert their positions. American and European reactions confirmed the Russian fears that its ability to act in its immediate neighbourhood could be constrained if it let new actors play a larger role in the region.

The situation has changed in the two territories that have finally seen their declared independence from Georgia recognised by their main sponsor, Russia.⁽³⁾ The latter, however, has not been able to convince any other regional player to follow suit in this recognition. This has left the territories even more dependent on Russia, in particular since existing links between South Ossetia and the rest of Georgia, which had flourished only a few years ago, are now severed. During the conflict, between 20,000 and 30,000 South Ossetians briefly joined the 100,000 of their kin that had taken shelter north of the border in the 1990s, but the war's final outcome affected ethnic Georgians most of all, not least the 20,000 who left South Ossetia and who are now living as internally displaced people. Neither during the war, nor after it, did any of the regional organisations of the former Soviet space – the Commonwealth of Independent States, the Collective Security Treaty Organisation, the Shanghai Cooperation Organisation or the GUAM/ODED group – play any noteworthy role, but neither did NATO, whose enlargement strategy greatly contributed to the increase in tension, and nor did the OSCE. The EU, in the end, is the only organisation that has managed to play a useful, if limited, role, and that still enjoys sufficient respect from both Georgia and Russia to be able to play an effective role in the field.

The conflict over Nagorno-Karabakh is far from dormant. Front-line incidents have not ceased and, indeed, have gained intensity in recent months. Whereas the OSCE Minsk Group is proving as inefficient as ever, Russia embarked on a renewed diplomatic offensive less than three months after the August 2008 war and has, since then, sponsored direct talks between the presidents of Armenia and Azerbaijan, to the extent that six out of the last ten encounters between the two have been sponsored by Russia. These efforts, however, will not easily bear fruit. Both Russia and Turkey would like to see an end to the conflict with the biggest potential for a large scale military confrontation in the area, but their positions often diverge. Armenia and Azerbaijan, meanwhile, lose no opportunity to disagree even on the points which previously seemed settled, such as the six points contained in the so-called 'Madrid Principles'.⁽⁴⁾

In contrast, violent armed incidents have been absent for a long time in the conflict over Transnistria. Both sides have shown moderation, in particular after the 2008 August War. Shortly after the clash, Russia sponsored directed talks between the Presidents of Moldova and Transnistria. Thus, Russia resumed the mediating role that in the past had almost yielded a final settlement agreement under the so-called Kozak memorandum, which was rejected by Moldova in 2005, with Western backing. The change in the Moldovan government, now led by a pro-European coalition, was not welcomed by Moscow but it has not led to recognition of an independent Transnistria by Russia. In June 2010, President Medvedev agreed with Chancellor Merkel that an improvement in EU-Russia security

³ To date (August 2010), three more UN members have recognised their independence: Venezuela, Nicaragua and Vanuatu.

⁴ The Madrid principles, made public by the Minsk Group in July 2009, set out six points for the solution of the conflict: Armenian withdrawal from the occupied provinces around Nagorno-Karabakh; temporary status for the territory; a corridor linking it to Armenia; final status confirmed by referendum; the creation of an international peace mission; and the return of refugees and internally displaced persons (www.osce.org/item/38731.html?print=1).

relations could start with a joint effort to solve the Transnistrian issue within the 5+2⁽⁵⁾ framework. All this is happening when Moldova's fragile pro-European government is trying to stabilise its hold on power, and to crystallise its reformist push against the resistance of the communist opposition, tacitly supported by Moscow.

The conflicts with the least prospect for evolution are those where things changed most rapidly in the August war: Abkhazia and South Ossetia. Other conflicts still poison the regional contexts, complicate bilateral relations (for instance, between Armenia and Turkey), jeopardise initiatives such as the 'Caucasus Stability and Cooperation Platform' and constitute potential flashpoints for future violence. They are not a mere diplomatic issue, but impinge upon the daily life of hundreds of thousands of refugees and internally displaced persons, as well as the citizens of pariah, non-recognised states, and contribute to bad governance, nationalistic and populist excesses, criminal transborder activities, eroded rule of law and dysfunctional economies. The politics, policies and economies of Armenia, Azerbaijan, Georgia and Moldova have been marked by hostilities ever since they gained independence.

2.4 Maritime Security and the New Naval Balance

From Georgian attempts to control incoming sea traffic into Abkhazia to the well publicised visits of American vessels to Georgian ports; from Russo-Ukrainian tensions over the use of the Black Sea Fleet during the war to speculations about alternatives to Sebastopol prior to the Kharkiv agreement; and, above all, taking into account the little-known naval dimension of the August 2008 war,⁽⁶⁾ naval issues must be taken extremely seriously in the region. Now that the tension over the extension of the Russian Black Sea Fleet presence in Crimea has abated, the questions revolve around the potential for incidents (in particular, if Georgia tries to exert its sovereignty over Abkhaz waters), the regional balance of forces, and the activities and presence of external actors, namely the USA.

The Russian Black Sea fleet proved in the war that it is operational and that it can tackle a regional rival, but its total potential is clearly diminished by years of neglect and under-investment. Its larger ships are between 25 and 40 years old, and most of them will need to be decommissioned in the next ten to fifteen years, if not before, due to poor maintenance in the 1990s. The recent news announcing a substantial renovation, including the purchase of four French-built Mistral-type vessels, has raised some questions about Russia's future naval potential. According to our information, the Russian naval command is not planning to deploy the first Mistral-type vessel in its Black Sea Fleet but in its Northern Fleet. The timetable of the Russian order – which suggests that the Russian navy wants delivery by autumn 2013 at the latest – might be an indication that the Russian presidency is hoping to deploy the vessel provisionally off Sochi during the 2014 Olympics in a dissuasive role *vis-à-vis* Georgia. Military experts stress that renewal of the Black Sea fleet will be difficult to carry out within the time scale set out by Anatoly Serdyukov, Russia's defence minister, both for budgetary reasons and questions of industrial capacity. Even supposing that the Russian command in Sebastopol receives the fifteen vessels promised, the balance of power in the region will remain favourable to

⁵ Since November 2005 "5+2 negotiations" on the final settlement of the conflict and the total withdrawal of Russian troops from Moldova have been taking place, bringing together the two direct actors (Moldova and Transnistria) and Russia, Ukraine, the OSCE, the EU and the US.

⁶ This naval dimension included the blockade of Georgian ports, the Russian landings in Ochamchira (Abkhazia) and in the Georgian port of Poti, and the sinking of Georgian military vessels in Poti as well as during a skirmish.

NATO. Moreover, the Mistral-type projection-and-command vessel requires an operational escort fleet, which the Russian naval fleet in Sebastopol will not be able to provide in the near future.

Turkey, a NATO member, and Russia share the common objective of making sure that the Black Sea is not used by the USA (with the support of regional allies such as Romania and Georgia) as a rearguard for possible operations in Middle Eastern theatres such as Iraq and Iran. This is related not only to their increasingly independent (and, often, divergent with the US) policies towards the region, but also to the fear that a continued and massive American naval presence would alter the regional balance and, in the Russian case, invalidate its own potential for deterrence and projection of force on the regional scale.

2.5 South Stream vs. Nabucco: Advantage Moscow

Ever since it became a new state on the demise of the Soviet Union, the new Russia has been very aware that energy would be one of its most important tools for projecting power in Eurasia and ensuring its own status and independence. In this context, controlling energy export routes to the EU has become a crucial objective, one that is deemed essential to Russian security, and the Black Sea region has been one important focus in this project. Initiated at the start of the summer in 2007 by Vladimir Putin and the Italian Prime Minister at the time, Romano Prodi, the South Stream gas pipeline project, from the standpoint of Moscow, responds to two strategic concerns. First, it bypasses Ukraine, then deemed to be an unreliable transit country. The thinking behind South Stream is comparable in every aspect with North Stream in this respect. Second, it enables Gazprom to counter the European Union-initiated Nabucco project, which would weaken its positions on the southern flank of the former USSR and in the Balkans.

The gas pipeline being promoted by Gazprom and its traditional partner in the Black Sea region, the Italian energy giant ENI, would link southern Russia to Bulgaria and thence fork north through the Balkans towards Austria and northern Italy and south via Greece and the Adriatic towards southern Italy. The originally envisaged annual 31 billion cubic-metre (bcm) capacity was increased to 63 bcm in June 2009. The commissioning date, first announced for 2013, has been postponed until 2015-2016, as Gazprom's own management admits. Since 2007, Russia's entire Balkan policy has been built around the South Stream project and Kosovo. Neither the economic crisis nor the cost of the pipeline – which no one has been able to calculate but which will doubtless be more than \$20bn – have weakened the resolve of Gazprom and the Russian authorities. The example of North Stream, which was also greeted with scepticism by most European observers, shows that one would be wrong not to take seriously the intentions of Russia's leaders concerning projects considered to be strategic.

Neither closer relations with Ukraine since the election of Victor Yanukovich, nor the repeated proposals of the Ukrainian authorities to form a tripartite consortium between Ukraine, Russia and the EU have persuaded the Kremlin to drop South Stream. On the contrary, a number of recent initiatives show that the project is being accelerated. One was the official incorporation of Électricité de France into the project last June during the St Petersburg International Economic Forum. Another was the signature in July of a procedural agreement with Bulgaria, despite the fact that relations between Russia and Bulgaria have cooled somewhat since Boyko Borisov's centre-right coalition came to power in 2009.

In this context, the next few months will be crucial for the European Union's Nabucco project. The financing package of up to €4bn approved in September 2010(7) is a major step towards

⁷ See http://www.enpi-info.eu/main.php?id_type=1&id=22424&lang_id=450

guaranteeing the funding but, if no tangible progress is made in terms of contracts with potential suppliers, the prospects of bringing the pipeline into being will be seriously undermined. From this point of view, the June 2010 Turko-Azerbaijani agreement (with the final details still to be finalised) is encouraging: having settled some basic issues, such as the price Turkey will pay for Azerbaijani gas and the additional amounts of gas that will flow into Turkey through the new Shah Deniz II pipeline from 2016, the agreement clears the way for direct deals between Azerbaijan's state-owned company SOCAR and potential European buyers, first and foremost Nabucco. The expected signature of a political agreement by the energy ministers of the countries concerned is also a step in the right direction. Ultimately, however, the success of the project depends on Turkmenistan and/or Kazakhstan having enough spare gas for the new contracts (and serious doubts have been raised about Turkmenistan's new Caspian developments) and deciding to join the project. This represents a considerable political risk for the leaders of the two countries concerned and whether they consider it justified is by no means sure.

3 THREATS AND RISKS IN THE BLACK SEA REGION

3.1 A New 'Great Game' between the Powers

During the Cold War, the Black Sea was one of the theatres in which the global confrontation was played out and, despite the initial hopes after its end, it never became a space for genuine great power cooperation. The traditional reasons for which it was vital to Russia (ice-free access to the seas, a door to the Mediterranean) and to Turkey (control over the Dardanelles as a major strategic asset) have now been joined by other, no less crucial ones: the south-eastern energy gate to Europe, a source of instability, the threat of external involvement, and the proximity of potentially serious geopolitical flashpoints (Palestine, Iraq, Iran).

After the wars in the 1990s were provisionally settled, two sets of loosely configured groups emerged, one bringing together Turkey with the GUAM countries, the other comprising Armenia, Russia and Iran. The former could count on American backing and openly shared values with the European Union. As discussed above, the internal evolution of Ukraine and the evolution of Turkey's Foreign Policy changed this scenario. The question now is whether the new environment will be more cooperative or more competitive.

Within the general reset of its relations with Russia, the USA has adopted a much more conciliatory approach to its presence in the region. However, neither NATO, nor the EU can accept being treated as an external actor therein. Even if Russia feels it has successfully blocked NATO enlargement, it cannot overlook the fact that Bulgaria, Romania and Turkey are already members: NATO is in the Black Sea, and will remain there for the time being. Accordingly, any ongoing rhetoric of hostility against NATO might result in a worsening of the security environment in the region. The EU is not only part of the sea's littoral, but it has its own projects in the region (enlargement to take in the Western Balkans and Turkey, the Eastern Partnership) in which all countries involved have chosen to participate.

The region, therefore, still holds the potential for confrontation, but also offers a window of opportunity: if its opposing groups of states slowly disband and the potential points of friction are progressively defused, there is a rare opportunity for the Black Sea to become an area of cooperation. Turkish-American relations, at odds over the Middle East, and Euro-Russian relations, which have been under strain for years, have in the Black Sea region good opportunities to redress the negative trend. The improvement of relations between some actors has not necessarily meant a deterioration

of other bilateral relationships: Ukraine has moved closer to Russia, but has not become hostile to the EU; Turkey's rapprochement with Armenia is viewed with suspicion in Baku, but the latter is still on excellent terms with Ankara; America has abandoned the NATO enlargement agenda in the region and 'reset' its relations with Russia without abandoning its allies in the area. These cooperative trends do not amount to an all-encompassing regional security transformation, but do hold out opportunities for new initiatives: reviving negotiations on stalled conflicts (starting with Transnistria), expanding security dialogue, and agreeing on confidence-building measures. Failure, however, could result in increased tensions in a region that has been for too long at the mercy of big-power competition.

3.2 Potential Flashpoints for Conflict

There are a number of issues in which conflict may go beyond the local level to become a regional crisis, as the South Ossetian conflict did in 2008, or simply become a source of tension and international confrontation, but without generating violence, as happened with Kosovo's declaration of independence.

- The Nagorno-Karabakh conflict is active on the ground, the majority of the Azerbaijani population is in favour of armed intervention (even after the August 2008 war), Armenia and, in particular, Azerbaijan keep piling up weaponry and pumping up the military rhetoric, and international mediation efforts have not secured any final results.
- The Russo-Georgian confrontation does not only affect the land borders with Abkhazia and South Ossetia, but also threatens other vital interests: external interference in Georgian politics is a concern; Russian prestige will be at stake during the 2014 Winter Olympics in Sochi – a region that neighbours Abkhazia; the Georgian (including Abkhaz) waters have the potential for a direct clash.
- Crimea is a less likely scenario for confrontation with Russia as long as the current Ukrainian government is in power, particularly after the Kharkov agreement. However, the fundamental issue of Ukrainian sovereignty over the territory and the loyalty of its inhabitants is not completely settled and could be a card to play in the event of change in Ukrainian politics. In addition, there is the Tatar question, in which some worrying signals of renewed tension have emerged since the new Ukrainian government took power.
- Authoritarianism is on the rise in Russia and the South Caucasus and, reportedly, even in a much freer Ukraine. Authoritarianism could result in regional outbreaks of violence coming from a frustrated opposition, amongst internally displaced persons and/or minority groups. Those outbreaks could be controlled and may become part of a peaceful democratic upheaval, which might succeed (as in Georgia in 2003, Ukraine in 2004, and Moldova 2009) or fail (as in Armenia in 2008), but they could also evolve into a regional security risk if they affected transborder minorities (such as Armenians in Georgia or Lezgins in Azerbaijan) or generated a collapse of authority similar to what occurred, in early summer 2010, in southern Kyrgyzstan.
- Transnistria is the scenario where Russia-EU cooperation could yield earlier results, but the tensions should not be underestimated. The government in Chisinau has not consolidated its power and faces a tough opposition that feels backed by Russia. In this situation, it will not be easy to reach an agreement with a hardened Transnistrian leadership that has seen the Russian recognition of Abkhazia and South Ossetia – with which it keeps close links – as a way forward for its own cause. The Ukrainian shift towards a position which is closer to Russia's will further

complicate things for the Moldovan government. In this context, an escalation is unlikely but not unthinkable.

- The North Caucasus, a part of the Russian Federation, has still not found total peace. If all-out wars like the two wars in Chechnya or the Ossetian-Ingush war have long since tailed off, violence, terrorist attacks, political assassinations and kidnappings are part of the landscape of Ingushetia, parts of Dagestan and, increasingly, other north Caucasian areas further west.
- The race for pipelines will probably not take the form of an open conflict, but it does impinge on the global security environment, in particular if competing energy projects result in a strengthening of confrontational tendencies in the region.
- Russia has not presented serious objections to the EU's enlargement to the Western Balkans and Turkey, and the prospect of other enlargements to the former Soviet countries is distant and uncertain. By contrast, NATO enlargement was a major factor for tension. NATO's new Security Concept and its implementation in the region, the way in which the alliance responds to Georgian requests for assistance and other possible engagements in the Middle East (see below), could result in tensions and even crises with Russia.
- A large-scale Middle East Crisis and, in particular, one in which the United States confronted Iran, could have direct consequences on the region. The US might be tempted to use the region for its operations and to pressure countries for their support; Iran would have the means to retaliate not only through direct military attack (a large part of the region would be within firing range of the Shahab-3 missiles) but also through indirect support for troublesome opposition groups (such as PKK in Turkey or Islamist militias in the Russian Caucasus).

3.3 Transnational Threats and Risks

Despite rivalries and complex bilateral relations, many of the threats and risks in the Black Sea region are, to a large extent, shared. Beyond the conflicts already mentioned and the competition between powers, it is worth mentioning at least four issues that may have an impact on the security of all the countries in the region:

- Terrorism and radical violence: if ethno-nationalism was the main driving force behind violence in the past, a new source of radicalisation is gaining ground in the region. Radical versions of Islam now inspire some groups operating in Turkey and, in particular, in the North Caucasus and pose a threat to all countries in the region.
- Partial or total state failure: territorial conflicts are not the only source of state failure. The disputes about borders and the existence of non-recognised governments have resulted in patchy control of transborder movements. As nationalism and militarism are glorified, the bases for good governance and the rule of law are ignored, and the provision of services to the citizens is insufficient. There is therefore a real risk that governments may lose control of parts of their territory and even become failed states, creating grey zones that would in turn result in threats for all the countries of the region.
- Transnational crime: the weakness of some states and the numerous barriers to legitimate trade and economic activity are fertile ground for all sorts of illegal transnational activities, from trafficking in human beings –for which the region became infamous in the last decade– to well established drugs transit and distribution routes. All these factors have fuelled corruption and provided opportunities for more dangerous activities, such as arms smuggling, to take place.

- Proliferation of armaments: the unstable security environment has created the incentive for visible rearmament in the region. This new arms race is poorly studied and quantified beyond the most obvious aspects (such as the Russian naval build-up discussed above). Illegal smuggling routes add the possibility of arms moving into non-state criminal and terrorist networks, further exacerbating instability. More worryingly, in a region where civil nuclear energy is widespread and where military nuclear capacity exists (in Russia), the fears of illegal smuggling of nuclear-related materials cannot be ignored. No country in the region would feel more secure if another Middle Eastern actor, be it Iran or any other, achieved nuclear status.

4 THE POTENTIAL FOR REGIONAL COOPERATION IN SECURITY

4.1 Regional Cooperation: from Economy to Security?

There is one big story in the region that the August 2008 war often eclipses: the extraordinary increase in economic links and the economic progress in the region. Some countries, like Greece and Ukraine, have been severely hit by the global downturn, but the region as a whole still shows unprecedented economic dynamism. More than regional institutions like the Organisation of the Black Sea Economic Cooperation, it is the new Turkish economic activism in its neighbourhood and the economic successes of countries like Georgia, Russia and Romania that have brought new dynamism to the region. Bilateral trade and investment links have flourished, in many cases even during the hardest times of economic crisis.

Can this success be translated from economy to security? Most certainly interdependence in economic terms will not dissolve political and sovereignty conflicts, but it can, and it has contributed to the emergence of a more cooperative environment, for example between Russia and Turkey. If the EU can contribute to that growth with the extension of links with countries like Ukraine, the economic environment may become a major incentive for all actors to find joint solutions to the shared security challenges. But the temptation of excluding security issues from the picture and focusing on economy only should be avoided: much as economic incentives are important, security issues can hold progress back for years if not directly addressed.

4.2 From Spheres of Influence to Regional Solutions

How can a cooperative climate be created? The first idea that must be made clear to all actors is that the Black Sea region and its countries are no one's 'backyard' or sphere of influence, and that good relations amongst all actors involved are in everyone's interest. Overcoming the zero-sum game mentality is not easy, and the best approach is probably to look for regional solutions for issues that equally affect all countries of the region. When it comes to security, cooperation is complicated by issues related to sovereignty and recognition of independence (for example, any attempt to agree on maritime security issues will somehow have to circumvent the disagreements about sovereignty over the waters off Abkhazia) and the balance of power. This does not, however, exclude the progress in regional cooperation on security matters in at least five different ways:

- Agreements to contain existing conflicts and to minimise their effects on the everyday life of citizens (for example, administrative arrangements to allow better mobility for citizens of non-recognised states), and focus on human suffering and the direct consequences of insecurity, giving priority to the most direct victims of violence (widows, the war-handicapped, internally displaced persons or refugees).

- Reactivation of conflict-solving formats, such as the 5+2 for Transnistria and the Minsk Process for Nagorno-Karabakh, and the mutual opening up of initiatives to the participation of other regional actors, avoiding any deliberate exclusion of major (Russia, Turkey, EU) or smaller actors.
- Regional agreements on fighting transnational threats, in particular international crime.
- Confidence-building measures, such as notification of naval military activity or public disclosure of arms sales.
- Joint proposals for the implementation of regional strategies by the OSCE and the Council of Europe, of which all countries of the Black Sea region are members. Both institutions have enough legitimacy to tackle some touchy questions that concern their traditional agendas. These may include military confidence-building measures, border management or refugees and internally displaced persons for the OSCE; and minority language policies, best practices in the fight against terrorism or institutional stabilisation for the Council of Europe.

4.3 Energy: the Choice between Confrontation and Cooperation

Energy has been and remains a main factor for regional competition. Confrontation can come in the form of a race for supplies, pressures on producers and transit countries, exclusive agreements outside market conditions, energy blackmail and destabilising actions that deliberately discourage foreign investment by worsening the risk assessments: all of these have already affected the region. Is there any scenario under which energy could become a factor for cooperation? Energy certainly can be, indeed is already, a domain of collaboration in areas such as civil nuclear energy and this could grow in other fields like electricity interconnection. Even with the thorniest issue, that of pipelines for gas supplies to Europe, there are three cooperative scenarios – but not all of them are favourable to the interests of the EU. For example:

- Russia, having ensured stability and control of the main Ukrainian supply routes, could contribute to the emergence of Turkey as a major gas hub controlling the south-eastern access to Europe in exchange for a solid stake in the project. This is, to a large extent, the South Stream scenario, in which Russia and, in particular, Gazprom, would gain even more control over pipelines bringing gas to Europe, while Turkey would retain influence as a transit country although it would increase its already high degree of dependence on Russia.
- Nabucco and South Stream might be completed and in operation if (and that is a big if) they both achieve enough volume of gas to be operating at the same time. In this scenario, competition would take place basically under market conditions. Similarly, EU, Turkish and Russian firms would play an important role and cooperate, and interdependence would be reinforced while excessive dependence (of Russia on Ukraine as a transit country, of the Caspian producers on Russia as a transit country, of the EU on Russia as a supplier and on Ukraine for transit) would be lessened.
- Europe could tackle its growing dependency on Russian gas through a combination of other sources (reduced consumption, other pipelines, Liquefied Natural Gas, shale and other unconventional forms of gas, other sources of energy such as renewable or nuclear) and Russia could deal with its dependency on gas exports to Europe (through exports to Asia, non-political prices to domestic and other former-Soviet consumers, energy efficiency, LNG exports, economic diversification), making way for a less securitised, more commercial energy environment in which regional energy cooperation in gas transportation and distribution takes place mostly at the private level, with profit as the ultimate rationale. That would have to be

combined with putting an end to the 'special', opaque deals that characterise energy relations between Russia and most countries in the region, and that compromise not only their energy security but even their autonomy as states.

4.4 Who is in and Who is out? The Limits of Inclusiveness

A basic question about regional cooperation on security issues in the Black Sea is who should be the participants. The question does not so much refer to regional identity and whether or not non-littoral countries such as Moldova, Armenia or Greece should be included, as to the crucial matters of how far, if at all, should partially or non-recognised states be taken into account, and whether the EU as a whole, the USA and even, in the Caucasus context, Iran, should be counted as regional players.

The marginalisation of the authorities of Transnistria, South Ossetia, Abkhazia and Nagorno-Karabakh from the general Black Sea regionalism is almost unavoidable, since participation would be seen as unacceptable and illegitimate not only by the governments of Azerbaijan, Georgia and Moldova but also by many others in the region. However, excluding the most problematic territories from security debates will also result in grey zones and doomed agreements. Hence, the effort to find formulas that could at least partly apply to these territories and their populations should not be lightly discarded. This can only happen in a cooperative environment and after serious mediation efforts, for instance between Russia and Georgia.

The other question of who is external and who is not is crucial to the future of security in the region. There can be no question that the EU as a whole, and not only Greece, Romania and Bulgaria, must be included in the regional cooperation. US participation is more sensitive to Russia and other regional players, but the change of course of the American administration in the last two years should allow for enough flexibility to find formulas for involvement. In any case, the US will be engaged through its membership in NATO. No major player supports the integration of Iran in the regional cooperation – even in the Caucasus context, only Armenia does – and a more active Iranian presence would sound the alarm bells throughout the region.

5 THE ROLE OF THE EU: CONCLUSIONS AND RECOMMENDATIONS

The influence of the West has been diminishing in the Black Sea region since 2008. The region has a lower priority for the Obama administration than it had for its predecessor. The European Union is suffering from the lack of ambition of its Eastern Partnership, as well as from doubts about further enlargement in the medium term. This tendency coincides with a growing assertion of Turkey's interests and a recovery in Russia's fortunes. As the landscape in the Black Sea region evolves, the EU should soon regain the initiative and contribute to shaping a security environment characterised by cooperation and problem solving. In order to achieve this, the EU could start with some of the following recommendations:

Regional cooperation on security issues must be based on a regional view, but it will often take a bilateral form. The EU should not only focus on the former, but also encourage the latter. This includes bringing a regional Black Sea dimension to Turkey-EU and Russia-EU dialogues on security issues, and encouraging good neighbourliness as a political condition for bilateral cooperation with all other countries in the region.

When entering into regional frameworks, the EU will have to resolve the issue of double representation (by member states and by central institutions) and progressively refrain from the sponsoring role it has sometimes played in the region in the past (which characterises, for instance,

its role in the Mediterranean). In the current context, equal partnership is an important added value, in particular if the EU wants to be included in security debates.

Until the next legislative elections in 2012 at the earliest, and perhaps even until the 2015 presidential elections, Ukraine is going to align its regional policy with that of Russia. It would be advisable not to leave Ukraine in a too-exclusive relationship with Russia, whether it is in the economic, political or military domain. With numerous indications that President Yanukovich considers certain Russian demands excessive, it is important that the European Union gives Ukraine some signs of openness while, at the same time, taking a firm stance on public liberties and reform.

The objective of improving governance, rule of law and state capabilities in the former Soviet states of the region is in itself a security strategy, since total or partial state failure and political stagnation create the conditions for external interference and transnational threats. Given their fragility, Moldova and the states of the Southern Caucasus should find in the EU strong and continued support.

Germany's attempt to make the settlement of the Transnistrian conflict a test of Russia's readiness to cooperate on questions of "shared neighbourhoods" should be supported. The pressure exerted by Russia since July on the entourage of "President" Smirnov is a promising sign in this respect. The EU should, at the same time, convince Moldova's new leaders to abstain from any rhetoric which could compromise the diplomatic process and ensure that settlement is not achieved at the expense of Moldova's right to choose its own political path.

In the short and medium term, Crimea, Nagorno-Karabakh and the Sochi region, where the 2014 Winter Olympics are due to be held, are the areas presenting the highest potential risks in the Black Sea basin. The EU should, therefore, follow the situation very closely and envisage setting up internal advance-warning systems and creating channels for direct contact with Russia, Turkey and the rest of the actors to expedite quick reactions so as to head off any risk of destabilisation and escalation. Contrary to a generalised perception, the 2008 August war did not happen overnight, but after an escalation of events, a lesson that should not be lost. Consultation with all Black Sea actors should be intensive enough to allow the EU to detect any escalation of the conflicts and to work with all Black Sea partners in order to defuse it promptly.

The populations of the non-recognised territories and the refugees and internally displaced persons have, in a way, become hostages of long-stalled negotiations. The EU should address the thorny issue of avoiding the constant bureaucratic punishment of populations by leading an initiative that would separate state recognition from an administrative admission of basic documents (such as driving licences or academic certificates), thus starting to break the isolation of these populations and improving mobility. This initiative should not apply to the EU only, but needs to be open to all European actors.

The EU should adopt a unified position and the High Representative should take the lead on the EU side in the negotiations on Transnistria and the Minsk Process for Nagorno-Karabakh (possibly arranging for a substitution of France by the EU as one of the three co-presidents of the Group), and it should not abandon its commitment to the situation in Georgia, including the direct presence of the EU Monitoring Mission.

The Eastern Partnership of the European Union was initially perceived with alarm in Moscow. The initial negative impression receded, but the lesson that a well-meaning initiative can be perceived as a threat should always be borne in mind. Given that all countries of the Eastern Partnership (EaP) except for Belarus are part of the Black Sea region, a consultative role for Russia and Turkey, beyond

the current provisions for *ad hoc* participation in some areas,⁽⁸⁾ could be envisaged. Turkey, in particular, could have positive contributions to make, having recently undertaken many of the reforms that will be asked from Eastern partners – as long as this is not used as an excuse to dilute its candidate status into one of a neighbour. Additionally, further opening up a major project such as this one to Russia and Turkey could be a strong argument in favour of gaining access to their future initiatives, such as the ‘Caucasus Stability and Cooperation Platform’, or establishing dialogues with the already-existing organisations, such as the CIS or the CSTO. Given the asymmetry of EU’s relations with Turkey and the delicate balance (which falls in favour of the EU side in almost all fields) with Russia, it would be unrealistic to insist on totally symmetrical involvement. There is no question that the EU must not allow them a *droit de regard* over its own initiatives. The EaP offers to the countries involved an alternative to excessive dependence on Russia: this character should not be lost sight of, but neither should it be interpreted as a contest for hegemony. Including some regional cooperation elements in the EU approach might help the success of ENPI and EaP, in particular because some actors, such as Armenia, Belarus and Ukraine, attach a very high priority to their good relations with Russia, which they are not willing to trade for closer relations with the EU.

Energy is unlikely to become an issue of cooperation overnight, in particular as far as gas is concerned. The EU should continue to pursue its diversification strategy while pushing for a more homogeneous, norm-based approach in the Black Sea region. The EU simply cannot compete with Russia in monopolistic practices and shady deals, so it must encourage and assist all countries in the region to build ever more interconnected, fair and transparent gas markets – a goal which may well not be shared by the local energy elite. Gas is not the only form of energy of interest in the region, and other areas of cooperation (for example, nuclear security in an area of both new developments and ageing nuclear power stations) might be more promising in the short term.

⁸ Both the Eastern Partnership and the Neighbourhood Policy foresee the possibility that third countries may participate on an *ad hoc* basis. See Paragraph 12 of the Joint Declaration of the Prague Eastern Partnership Summit, 7 May 2009 (www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/er/107589.pdf) and Art. 27 of the ENPI regulation (http://ec.europa.eu/world/enp/pdf/oj_l310_en.pdf).

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