



Webinar Report II:

Geopolitical Dynamics Impacting Energy Security

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Introduction

The Black Sea Region (BSR) stands as a pivotal geopolitical and geoeconomic interface connecting Europe, Asia, and the Middle East. As a corridor for energy transit, maritime trade, and regional cooperation, its significance has only grown in recent years, particularly in light of ongoing conflicts and strategic power realignments. The intensification of the Russia-Ukraine war, the evolving regional policies of littoral states, and the emergence of new energy discoveries have all contributed to reshaping the energy security architecture in this complex area.

This webinar marked the second session of the *#SecureBlackSea* project and explored the multifaceted role of energy as both a strategic asset and a source of vulnerability within the evolving geopolitical context of the BSR. Convening regional experts, practitioners, and policy analysts, the webinar addressed critical themes including infrastructure fragility, hybrid threats, the geopolitical significance of energy transit corridors, and the implications of the global energy transition. Participants underscored the shifting configurations of power in the region, emphasizing not only military and political developments but also the growing relevance of energy interdependencies, control over critical raw materials, and emerging models of regional cooperation.

The session was grounded in the premise that energy is not solely an economic or technological concern, but a deeply interconnected issue that spans diplomacy, conflict prevention, environmental governance, and institutional resilience. Discussions moved beyond conventional energy policy debates to consider the broader human, ecological, and institutional dimensions of current and future energy strategies. Speakers consistently emphasized that a comprehensive understanding of the relationship between energy and regional security demands a multidisciplinary approach, which integrates insights from



international relations, energy economics, environmental studies, and critical infrastructure policy.

The Black Sea as a Strategic Energy Corridor:

The BSR is increasingly recognized as a pivotal geostrategic and geoeconomic corridor that connects diverse zones of energy production, transit, and consumption, spanning the Caspian Basin, the South Caucasus, the Balkans, Central Europe, and even the Eastern Mediterranean. Discussions during the webinar highlighted the region's growing importance in facilitating the flow of both hydrocarbon and renewable energy resources toward European markets, particularly in the context of Europe's urgent drive to diversify away from Russian energy dependence. The BS serves as a critical conduit for pipeline infrastructure, liquefied natural gas (LNG) terminals, and prospective offshore wind and undersea electricity projects. However, despite this strategic relevance, the region remains politically fragmented and institutionally underdeveloped, lacking a cohesive regional governance framework for energy security and cooperation.

The panelists of the webinar have emphasized that energy security in the BS must be understood in multi-dimensional terms, encompassing not only physical infrastructure resilience and energy supply diversification but also the underlying political economy of energy relations, regulatory interoperability, and technological innovation. This complexity reflects the intersection of national interests, regional power dynamics, and global energy transitions, all of which shape the feasibility and sustainability of energy strategies in the region.

The notable participants have also drawn attention to the fractured regional architecture, marked by the absence of a shared vision among the Black Sea littoral states. As in other domains of regional security, energy governance suffers from competing geopolitical agendas, incompatible regulatory standards, and limited multilateral mechanisms. This institutional vacuum amplifies the vulnerability of critical energy infrastructure to both traditional military threats and hybrid threats, such as cyberattacks, disinformation campaigns, and economic coercion. Moreover, panelists noted that the diversity of political regimes across the region (from consolidated democracies to competitive authoritarian and hybrid systems) complicates the efforts to formulate coherent and unified energy policies. Authoritarian energy-exporting states and liberal energy-importing democracies often operate under fundamentally divergent strategic logics, legal systems, and institutional norms. These differences hinder mutual trust, obstruct legal harmonization, and weaken the prospects for building a robust and cooperative energy security architecture. Without a renewed commitment to regional dialogue and confidence-building, the BS risks



remaining at a contested periphery rather than evolving into a stable, rules-based energy corridor.

Weaponization of Energy and Infrastructure Insecurity:

One of the central themes that emerged from this fruitful discussion was the accelerating weaponization of energy and the corresponding rise in infrastructure insecurity. Energy, once perceived primarily as a neutral economic input or a catalyst for regional cooperation and is increasingly being deployed as a strategic instrument of coercion, deterrence, and geopolitical influence. This transformation has become particularly visible in the wake of the Russia–Ukraine war, where the deliberate targeting of energy assets such as the sabotage of pipelines, the imposition of LNG sanctions, and the disruption of energy trade routes has fundamentally altered the security landscape of the Black Sea region.

One of the discussants emphasized that energy infrastructure should no longer be viewed solely as a civilian domain but as a high-value target in contemporary hybrid warfare strategies. Cyberattacks on refineries and power grids, physical assaults on undersea cables, and the growing militarization of offshore production zones illustrate how energy systems are now situated at the intersection of economic interdependence and national security. The blending of kinetic and non-kinetic tactics, including digital sabotage, economic pressure, and strategic misinformation, has rendered energy infrastructure increasingly vulnerable in times of both war and peace.

The discussants of the webinar have also highlighted the paradoxical nature of ongoing energy trade in the Black Sea: even as geopolitical tensions escalate, commercial vessels carrying oil, gas, and other energy commodities continue to transit within the region. This coexistence of operational continuity and strategic instability reflects a fragile equilibrium, sustained more by necessity than by trust or legal guarantees. It underscores the urgent need for the development of robust regional security norms, deconfliction mechanisms, and protective legal instruments tailored to protect critical energy infrastructure.

A major concern raised during the webinar was the persistent legal ambiguity surrounding attacks on energy infrastructure under international law. Current frameworks, including the Geneva Conventions and the United Nations Convention on the Law of the Sea (UNCLOS), offer only partial or indirect protections, creating significant gaps in deterrence and response mechanisms. In the absence of clear legal codification, such attacks often fall into a grey zone, making attribution, accountability, and retaliation both difficult and politically contentious. This legal vacuum undermines the stability of energy corridors and discourages foreign investment in essential infrastructure projects.



In response, some of the participants of the webinar called for the development of new multilateral treaties, codes of conduct, or binding regional agreements specifically designed to safeguard energy infrastructure in contested and conflict-prone regions. These mechanisms, they argued, should not only clarify the legal status of energy assets in times of crisis but also promote resilience through cooperation, information-sharing, and capacity-building across the region. Without such instruments, the strategic manipulation of energy will likely continue to undermine regional trust, institutional legitimacy, and long-term economic stability.

Azerbaijan's Role and Connectivity Initiatives:

Azerbaijan's role in shaping the Black Sea and wider Eurasian energy landscape emerged as a prominent theme during the webinar. As the initiator and backbone of the Southern Gas Corridor (SGC), a major infrastructure network that delivers Caspian gas to European markets via Georgia and Türkiye, Azerbaijan is widely recognized as a critical supplier in efforts to diversify Europe's energy sources away from Russian dependence. Through connections to countries such as Romania, Bulgaria, Greece, and Italy, the SGC has significantly enhanced Europe's energy security, particularly in the wake of the Russia-Ukraine war.

Beyond hydrocarbons, Azerbaijan is actively advancing a broader connectivity agenda aimed at integrating the Caspian region with both the BS and European energy markets. One of the most ambitious projects discussed was the Black Sea Submarine Electricity Cable, a planned transcontinental transmission line linking Azerbaijan, Georgia, Romania, and Hungary. This initiative is designed to export electricity generated from Azerbaijan's growing portfolio of renewable energy sources particularly solar and wind—thereby aligning energy development with global decarbonization goals and EU Green Deal priorities. Webinar participants widely hailed the project as a strategic step toward future-proofing energy cooperation in the region. However, they also cautioned that the long-term success of such connectivity initiatives hinges on the creation of stable regulatory environments, predictable investment frameworks, and inclusive governance structures. Without these, ambitious projects risk being stalled by legal disputes, political instability, or lack of investor confidence. Azerbaijan's ability to act as a reliable bridge between Central Asia and Europe, while promoting transit diversification, remains a geopolitical opportunity but also a delicate balancing act.

One of the discussants noted that Azerbaijan's evolving foreign policy posture particularly its deepening engagement with Türkiye, growing energy cooperation with the EU and expanding economic relations with China positions it as a critical



intermediary between East and the West. This multi-vector diplomacy could enhance regional stability if managed through transparent and cooperative mechanisms. However, the same dynamics could render Azerbaijan a source of geopolitical friction, especially if strategic interests between these global actors diverge or become competitive. As one panelist put it, Azerbaijan's future role in the regional energy order may serve either as a **stabilizing force for multilateral energy diplomacy** or as a **point of contention in a more fragmented and polarized Eurasian energy landscape**.

Ultimately, Azerbaijan's positioning at the crossroads of strategic supply routes, its willingness to invest in both fossil fuel and renewable infrastructure, and its centrality in transregional initiatives underscore its importance not just as a supplier, but as a regional energy hub and diplomatic actor. The extent to which this potential is realized will depend on sustained international engagement, transparent institutional governance, and the ability to navigate competing geopolitical pressures.

Transition, Dependence, and Critical Minerals:

Our discussants also highlighted three converging trends reshaping energy security: the hybrid targeting of infrastructure, economic weaponization of energy flows, and the global energy transition. The transition away from hydrocarbons brings new dependencies particularly on rare earths and critical minerals dominated by Chinese supply chains. Europe's Green Deal and PowerEU strategies were cited as ambitious but vulnerable to these new asymmetries.

Some notable participants emphasized that the green transition is not merely about decarbonization but about navigating new geopolitical fault lines, particularly with respect to supply chains, refining capacities, and global competition for technological leadership. This includes the risk of creating "green vulnerabilities", where states achieve carbon neutrality at the expense of strategic autonomy. As one participant noted, overreliance on external suppliers of lithium, cobalt, and neodymium may simply substitute one geopolitical dependency (on fossil fuels) for another (on critical minerals).

United States and the European Union (EU) Perspectives:

Transatlantic perspectives on energy security in the BSR were a recurring point of discussion, revealing notable divergences in strategic posture between the United States and the EU. Participants observed that the U.S. is increasingly favouring bilateral or minilateral energy partnerships over broader multilateral frameworks. This trend reflects a pragmatic shift toward transactional



diplomacy, with the U.S. positioning itself as a major supplier of high cost liquefied natural gas (LNG) to Europe. While this bolsters short-term diversification efforts, it also raises questions about long-term affordability, environmental sustainability, and dependency dynamics.

In contrast, the EU, despite its strategic rhetoric on reducing reliance on Russian energy, has been criticized for the slow implementation of key infrastructure initiatives and policy inconsistencies among the member states. Some notable participants noted the contradiction between EU commitments under the REPowerEU strategy and the continued import of Russian LNG and oil derivatives by some member states. This disconnect undermines both the credibility and effectiveness of the EU's external energy diplomacy.

The divergence between U.S. and EU approaches underscores the urgent need for greater transatlantic policy coherence. Participants emphasized that closer coordination is essential—not only for energy security, but also for broader regional stability. In this context, multiple speakers advocated for the development of a dedicated **Black Sea Energy Strategy**, to be embedded within NATO's strategic concept and the EU's Common Security and Defense Policy (CSDP). Such a strategy could serve as a guiding framework for aligning infrastructure investment, regulatory standards, and geopolitical risk assessments.

The potential role of the Energy Charter Treaty (ECT) was also raised. Although increasingly contested and in need of reform, the ECT remains one of the few legal instruments capable of protecting cross-border energy investments and facilitating dispute resolution. Some panelists suggested that modernizing the ECT to better reflect climate imperatives and geopolitical shifts could provide a more robust foundation for regional energy cooperation and investor confidence in the BS.

China as a Strategic Energy Actor:

China's expanding footprint in the global energy landscape was a subject of considerable debate, particularly with regard to its role within the BS and Central and Eastern Europe (CEE). As the world's leading producer and exporter of renewable energy technologies including solar panels, wind turbines, batteries, and electric vehicles, China is leveraging its industrial capacity to shape the global energy transition on its own terms. Participants noted that China's influence is no longer confined to distant markets: it is materializing in the form of direct investments in battery production facilities, smart grid infrastructure, and rare earth refining plants in countries such as Hungary and Bulgaria.

The discussants of the webinar also emphasized China's deepening partnerships



with Azerbaijan and several Central Asian states, aimed at integrating energy flows, transportation routes, and digital infrastructure into what many interpret as a Eurasian extension of the Belt and Road Initiative (BRI). While these efforts contribute to connectivity, they are also seen as part of a broader strategic push to reshape supply chains and increase geopolitical leverage.

There was general agreement that China's role in the Black Sea energy equation cannot be ignored. Whether viewed as an economic opportunity or a geopolitical risk, Beijing's increasing presence must be accounted for in any forward-looking regional energy strategy. However, concerns were raised about the opacity of Chinese energy diplomacy, particularly regarding transparency, environmental safeguards, and labor standards. While Chinese investments are often framed as "win-win" cooperation during the webinar, the lack of accountability and public oversight has led to growing skepticism, especially in democratic states where regulatory frameworks are more robust.

Some notable participants warned that without common standards and strategic foresight, Chinese-led projects may exacerbate asymmetries in influence, weaken democratic resilience, or create dependencies incompatible with EU norms and strategic autonomy.

Maritime Rules, NATO, and the Montreux Convention:

The legal and operational framework governing maritime activity in the BS was identified as both a stabilizing force and a strategic constraint. Central to this discussion was the **Montreux Convention of 1936**, which regulates the passage of naval vessels through the Turkish Straits and limits the military presence of non-littoral states in the BS. While the Convention has helped maintain a degree of stability by restricting naval escalation, it also limits the ability of NATO member states especially the U.S. and other non-coastal allies to project power and respond to emerging maritime security challenges.

Our discussants expressed concern that the current legal regime does not fully account for new types of security threats, particularly hybrid operations targeting offshore infrastructure, commercial shipping, and maritime domain awareness systems. Several experts argued for the need to update NATO's strategic posture in the Black Sea by integrating energy security and critical infrastructure protection into maritime exercises, defense planning, and threat assessments. A tailored NATO Black Sea Strategy, focused on both hard security and resilience-building, was seen as an essential step in responding to the region's unique legal and geopolitical constraints.

In light of the Montreux Convention's limitations, discussants of the webinar



proposed enhancing civil-military coordination within the bounds of international law. This includes greater collaboration with civilian maritime agencies, such as coast guards, port authorities, and customs services. By integrating energy security concerns into NATO's maritime situational awareness framework, the Alliance would be able to improve detection, attribution, and response capabilities without violating the letter or spirit of Montreux.

Concluding Remarks: Can Energy Be a Driver for Regional Cooperation?

The concluding discussion centered around a critical question: ***Can energy act as a catalyst for regional cooperation, or will it deepen existing divisions and rivalries?*** While the securitization and weaponization of energy were well-documented throughout the session, participants also highlighted numerous examples where shared energy interests have generated cooperation across geopolitical fault lines.

Successful projects such as the Southern Gas Corridor, the Trans-Anatolian and Trans-Adriatic pipelines, and the planned Black Sea submarine electricity cable linking Azerbaijan, Georgia, Romania, and Hungary were cited as evidence that interdependence through energy infrastructure can create incentives for stability and dialogue. Such projects not only support energy diversification and decarbonization goals but also serve as diplomatic bridges between regions with differing political systems and strategic orientations.

However, the panel also acknowledged several risks. Chief among them is the rise of "energy populism," wherein governments instrumentalize large-scale energy projects to bolster domestic legitimacy or consolidate political power, without a genuine commitment to regional integration. This dynamic, often accompanied by non-transparent decision-making and politicized infrastructure investment, threatens to undermine trust and impede sustainable cooperation.

Ultimately, the webinar was concluded that energy holds the potential to be both a driver of cooperation and a source of conflict. Realizing the former outcome depends on building inclusive institutions, harmonizing regulatory standards, ensuring transparency in project development, and aligning infrastructure planning with broader regional peace and security goals. Only through deliberate multilateralism and shared ownership can the transformative power of energy be harnessed for long-term regional stability.



#SecureBlackSea

The Black Sea region has long been a focal point of geopolitical competition, shaped by historical rivalries, strategic interests, and evolving security dynamics. In recent years, the region has witnessed growing instability due to escalating tensions, hybrid threats, and the ongoing war between Russia and Ukraine. These developments have disrupted regional security and challenged the European and transatlantic security order. Given NATO's strategic interest in the region, a comprehensive reassessment of security frameworks is necessary to address emerging threats and enhance regional stability.

SecureBlackSea seeks to examine and propose a future security architecture for the wider Black Sea Region, aligning with NATO's evolving strategic priorities. In-depth analyses of existing security structures, regional conflicts, and cooperation mechanisms aim to provide evidence-based insights into key threats and potential policy responses. A particular focus will be placed on the intersection of conventional military threats, hybrid warfare, economic security, and geopolitical rivalries, recognizing the complex and multi-dimensional nature of regional security challenges.

The project activities include: expert workshops, field research, and data-driven assessments of security risks. It will evaluate the effectiveness of existing regional security frameworks and NATO's role in shaping stability in the BSR. Collaborating with policymakers, security experts, and academic institutions, the project team will facilitate policy dialogues and strategic foresight discussions to identify pathways for strengthening regional security cooperation. These efforts will result in developing comprehensive policy recommendations to enhance institutional resilience and foster a more cooperative security environment.

The expected outcomes of this initiative include a thorough assessment of regional security threats, a set of actionable policy recommendations, and strengthened dialogue between NATO and regional stakeholders. The project will contribute to an informed security discourse by producing analytical reports and policy briefs and providing practical solutions for mitigating regional risks. Additionally, fostering collaboration between academic and policy communities will support long-term strategic planning and resilience-building efforts.

The project aspires to provide a timely and in-depth examination of the evolving security landscape in the region.

Addressing traditional and non-traditional security challenges will offer valuable insights that can guide NATO's strategic engagement in the region. Through rigorous analysis and stakeholder engagement, it aims to contribute to a more stable, secure, and cooperative Black Sea security environment in the face of emerging geopolitical complexities.

The views expressed in this report represent only the opinions of the webinar participants. They should not be taken as an official view of, or endorsed by, the supporting and partner institutions or the project team.



