



Webinar Report III:

The Role of the Defence Industry and the Evolving Technologies on Black Sea Security and Policymaking

9 December 2025

Introduction

The webinar, convened under Chatham House rules as part of the NATO Science for Peace and Security supported *#SecureBlackSea* project, brought together a diverse group of scholars, former ministers, defence industry experts, and security practitioners to assess the rapidly shifting dynamics of Black Sea security. Far from being a routine academic exchange, the conversation unfolded against the backdrop of an unprecedented transformation in regional threat perceptions triggered by Russia's full-scale invasion of Ukraine. Participants approached the topic with a shared understanding: that the Black Sea has become one of the most volatile security theatres in Europe, and that developments in military technology are reshaping not only battlefield outcomes but also national policy agendas.

The webinar thus served a dual purpose. First, it aimed to capture expert insights into how new defence technologies, particularly unmanned and autonomous systems, are altering the military balance in the region. Second, it explored how these technological shifts intersect with structural political constraints, institutional frameworks, and the uneven defence-industrial capacities of littoral states. Through this lens, the Black Sea was understood not merely as a geographical space but as a 'strategic ecosystem,' where war, deterrence, alliance politics, and defence-industrial innovation converge. Participants repeatedly emphasized that without understanding these interdependencies, it is impossible to design future-oriented security policies or NATO-EU cooperation strategies that effectively address emerging challenges.



The Strategic Context: Russia's War Against Ukraine as the Defining Variable

A dominant theme throughout the discussion was the extent to which Russia's war against Ukraine now defines every dimension of the Black Sea strategic environment. The war has unleashed a range of cross-border risks that no littoral state can afford to ignore. Missiles and drones, whether malfunctioning or deliberately routed, have violated NATO airspace, raising fears of inadvertent escalation. The sea itself has become a contested zone, with drifting mines posing a threat to international shipping lanes, insurance markets, and port operations. Participants also drew attention to strikes on oil terminals, pipelines, and offshore energy platforms, critical infrastructures whose vulnerability has increased substantially. Beyond tangible security risks, the war has intensified information warfare, propaganda, and cognitive influence campaigns across the region, complicating societal resilience and political decision-making. Environmental degradation resulting from attacks on maritime assets and industrial facilities further adds to the long-term governance burdens littoral states will face.

Within this climate of instability, the militarization of contested territories, particularly in areas such as Abkhazia, was cited as a worrying sign of Russia's intent to entrench its presence in the broader Black Sea basin. These developments have fragmented perceptions of threat among the littoral states, each of which calibrates its security posture differently based on historical experience, political priorities, and alliance alignment. Participants agreed that without a shared perception of threat, building a robust regional security architecture becomes extraordinarily difficult.

Capability Gaps and Rising Military Innovation

One of the clearest insights emerging from the webinar was the recognition that the war in Ukraine has accelerated a fundamental transformation in the character of warfare. The Black Sea has become a real-time laboratory for military innovation, where unmanned and autonomous systems are redefining cost-benefit calculations and operational doctrines. Speakers repeatedly highlighted Ukraine's successful use of unmanned surface vessels and other autonomous maritime systems to challenge the Russian Black Sea Fleet; an achievement that would have been inconceivable just a few years ago.



These developments demonstrate that relatively low-cost platforms, when combined with advanced sensors, AI-driven targeting, and networked communications, can produce strategic effects typically associated with far more expensive systems. As one expert noted, this technological asymmetry is forcing NATO allies in the region to rethink their force-structure priorities.

Against this backdrop, participants identified several urgent capability needs. Air and missile defence systems must be expanded and integrated to protect against drones, cruise missiles, and hybrid airborne threats. Drone-defence technologies, ranging from electronic warfare to kinetic interceptors, are becoming essential for both military installations and critical infrastructure. Situational awareness must be enhanced through a multilayered network of land-based, maritime, aerial, and space-based sensors feeding into strengthened C4ISR structures. These systems will increasingly rely on artificial intelligence for rapid threat detection, decision support, and coordinated responses.

Equally pressing is the need to scale up ammunition production, an area in which European states continue to lag behind wartime consumption rates. Mine countermeasures emerged as another indispensable capability, given the persistent dangers posed by drifting mines to commercial vessels and naval assets. The overarching conclusion was that technological agility, not merely increased spending, is now the decisive factor shaping military effectiveness in the Black Sea.

Defence Industry Trends and Opportunities for Cooperation

The webinar also underscored the growing importance of defence-industrial capacity as a strategic variable in the Black Sea region. The spread of Turkish defence technologies, including drones, guidance systems, and MILGEM-class naval vessels, was presented as a compelling example of how regional industrial cooperation can enhance interoperability and drive modernization. These shared systems can serve as a foundation for common training, integrated logistics, and joint maintenance facilities, thereby reducing long-term costs and enhancing strategic cohesion.



However, participants cautioned that the Black Sea lags far behind the Nordic region, where states have successfully pooled procurement, synchronized capability development, and established a shared strategic culture. Trust deficits, historical grievances, and divergent foreign policy priorities hinder similar cooperation among Black Sea states. Despite these challenges, the Türkiye–Romania–Bulgaria Mine Countermeasures Task Force (MCM Black Sea) was hailed as a rare instance of rapid and effective trilateral collaboration, an encouraging model for future initiatives.

Experts agreed that while full-scale industrial integration may remain unrealistic in the near term, targeted cooperation—especially in emerging defence technologies, maintenance of shared platforms, and threat-specific missions can yield meaningful benefits.

NATO, the EU, and the Shifting Transatlantic Balance

A significant portion of the discussion centred on the evolving strategic posture of the United States and its implications for European defence. Recent U.S. strategic statements, coupled with political signals from Washington, have amplified concerns that Europe must assume a far greater share of its own security burden. This shift has profound consequences for Black Sea states, which rely heavily on U.S. military capabilities, particularly in air and missile defence, Intelligence, Surveillance, and Reconnaissance (ISR), electronic warfare, and space-based assets.

Participants observed that the EU is attempting to address some of these gaps through new initiatives—including the European Defence Industrial Strategy, the SAFE procurement framework, and expanding investment in military mobility and dual-use infrastructure. However, doubts remain as to whether EU instruments alone can compensate for the depth and breadth of American military power. Some speakers emphasized that NATO remains indispensable, especially in the face of an assertive Russia. Others countered that structural changes in transatlantic relations mean Europe must urgently invest in autonomous defence capabilities, regardless of U.S. involvement. What emerged was a consensus: the future of Black Sea security will depend on Europe's ability to significantly accelerate defense innovation, deepen industrial coordination, and take steps toward interoperability that cannot wait for political clarity from Washington.



Structural Barriers to Regional Cooperation: Trust, Politics, and History

The most significant non-technical barrier discussed in the webinar was trust, or more accurately, the persistent lack of it among Black Sea states. Participants drew unfavourable comparisons with the Nordic-Baltic region, where a shared threat perception and strong political cohesion have enabled states to form highly integrated defence structures. By contrast, the Black Sea region is fragmented by unresolved disputes, competing national agendas, and divergent historical experiences with Russia.

Tensions between certain NATO members, mutual suspicions over intelligence-sharing, and the absence of robust confidence-building mechanisms further erode the foundations for regional cooperation. Several experts noted that some littoral states do not perceive Russia in the same existential terms, limiting their willingness to commit to deeper strategic integration. The overarching lesson from the discussion was that regional cooperation must begin modestly through practical, narrowly defined tasks that build habits of collaboration rather than through grand institutional designs that are unlikely to gain traction.

Emerging Policy Questions: Innovation, Procurement, and Military Transformation

The webinar also drew attention to a set of critical policy questions that must be addressed if Black Sea states are to adapt effectively to the new strategic environment. Defence innovation systems remain underdeveloped across the region, with weak linkages between universities, research centres, private industry, and the armed forces. Procurement cycles are excessively slow, out of sync with the rapid technological evolution demonstrated on the battlefields of Ukraine.

Participants emphasized that military doctrine must evolve to reflect the realities of drone warfare, AI-enabled targeting, and autonomous operations. Institutional resistance within armed forces, rooted in traditional hierarchical command structures, often slows this transformation. Furthermore, new legal and regulatory frameworks are needed to govern dual-use infrastructure, protect critical underwater assets, and ensure rapid military mobility during emergencies. These challenges require a



coordinated approach that spans national governments, NATO, the EU, and the private sector.

Conclusion: The Imperative of Practical, Incremental Cooperation

The discussion concluded on a pragmatic note. Although the Black Sea faces overlapping crises, including war and geopolitical rivalry, as well as technological disruption, participants agreed that meaningful progress is possible through targeted, incremental cooperation. Mine countermeasures, joint maritime surveillance initiatives, drone-defence innovation hubs, shared logistics and maintenance arrangements, and coordinated protection of critical infrastructure were all cited as practical next steps.

Ultimately, the Black Sea will remain a central component of Europe's security architecture for the foreseeable future. If littoral states can combine strategic foresight with operational pragmatism and commit to building trust through concrete projects rather than rhetoric, the region can make significant strides toward stability and resilience. Future outputs of the Secure Black Sea project—including policy briefs and scenario-building workshops—will aim to advance this agenda by providing analytic clarity and actionable recommendations for policymakers.



#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 the development of 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 insights that can inform NATO's strategic engagement in the region. Through vigorous 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 or endorsement of, or by, the supporting and partner institutions or the project team.



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