



EU Unpacked

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EU Unpacked # 15

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The EU's Black Sea Strategy After One Year

An In-Depth Analysis for Non-Experts

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I. What the Report Is and How to Read It

In May 2025 the European Commission and the High Representative set out the European Union's strategic approach to the Black Sea region¹ — a document this publication examined at the time as a significant but under-resourced attempt to treat the Black Sea as strategic space rather than periphery.² It contained an unusual instruction: it asked its own authors to report back within a year. On 3 July 2026 they did. [Final Report](#) is the resulting **joint report on the implementation of the EU strategic approach to the Black Sea region**, and it is the subject of this analysis.³

Implementation reports create no obligations and nobody is required to act on them. What they do is establish an official account of what happened — a baseline cited in Council conclusions, parliamentary questions and funding arguments for years afterwards. Two features of this one shape everything below. It is written by the institutions whose performance it assesses. And it measures progress in a particular currency: meetings convened, platforms launched, studies published. The distinction that matters throughout is therefore between **engagement** and **outcome**. A ministerial meeting is engagement. A functioning maritime security hub is an outcome. One year in, the report is full of the first and necessarily thin on the second.

II. Pillar One: Security, Stability and Resilience

The Strategy's flagship security commitment was a **Black Sea Maritime Security Hub**, a regional centre for pooling information about what happens at sea. One year on, Bulgaria and Romania have jointly developed a concept for it: a civilian-led, inter-institutional network intended to improve maritime situational awareness, protect critical infrastructure and produce common threat assessments, with Türkiye, Ukraine and Moldova as initial partners. A concept is real progress from a paragraph in a communication. It is not a hub.⁴

Tangible results sit alongside it. The EU Advisory Mission in Ukraine helped establish a national Joint Maritime Security Centre in Odesa, whose concept of operations was endorsed in May 2026. Sanctions now list 632 vessels and more than sixty enablers tied to Russia's shadow fleet — the ageing, opaquely owned tankers used to move sanctioned oil. The Netherlands and Belgium donated seven mine-countermeasure vessels to Bulgaria. A Cable Security Toolbox published in February 2026 made the Black Sea a priority area for undersea cable projects.

The largest figures, however, belong to other instruments. Some twenty billion euros will reach Romania and Bulgaria under SAFE, the EU's defence loan mechanism; the Ukraine Support Loan for 2026–27 is worth ninety billion, sixty billion of it for defence-industrial capacity. Neither was created by the Black Sea Strategy. Both are counted towards it. The report is transparent about this, and a strategy meant to coordinate existing tools may fairly claim credit for directing them. But a reader asking what the Strategy caused that would not have happened anyway will find the security chapter harder to assess than its length suggests.

III. Countering Hybrid Threats and Protecting Elections

If any part of the first year reads as genuine delivery, it is the work on hybrid threats — the use of disinformation, cyber operations and covert funding to destabilise a country without crossing the threshold of armed attack. Here the report describes instruments designed, deployed and used within the reporting period.

The clearest case is the **Hybrid Rapid Response Teams**, small groups of EU experts sent at short notice to advise national authorities on electoral integrity. They were deployed twice: to Moldova before the September 2025 parliamentary elections, and to Armenia before its June 2026 elections. Neither produced

the outcome Russia was working towards. Causation cannot be claimed from that alone, but the sequence — threat identified, instrument deployed, election held — is the kind of chain the rest of the report lacks. Sanctions data point the same way: by April 2026 the regime against Russian destabilising activity covered sixty-nine individuals and nineteen entities for large-scale information manipulation, alongside a cyber regime reaching nineteen individuals and seventy-four entities. A regional hub of the European Digital Media Observatory now supports Moldova in detecting manipulation campaigns, and a new civilian mission in Armenia, established in April 2026, carries foreign information manipulation and interference explicitly in its mandate.

One judgement follows. The EU's comparative advantage in the Black Sea is not naval but institutional. Where it can lend expertise, legal frameworks and rapid technical assistance to a willing government, it performs well. Where delivery requires ships, ports or the consent of an unwilling government, it performs considerably less well.

IV. Pillar Two: Connectivity, Trade and Energy

The second pillar produced the Strategy's most distinctive new machinery. Its flagship is the **cross-regional Connectivity Agenda**, an effort to make the **Trans-Caspian Transport Corridor** — the route from Central Asia across the Caspian and the South Caucasus to Black Sea ports and into the EU, commonly called the Middle Corridor — commercially reliable rather than merely geographically possible.

Three steps stand out. A ministerial meeting in Luxembourg in October 2025 brought EU Member States together with partners from the Black Sea, the South Caucasus and Central Asia, giving the corridor a political forum it had never had. In February 2026 the Commission published a meta-study reviewing more than two hundred existing or planned investment projects along the route and mapping where infrastructure is missing, obsolete or too small for present volumes. On 23 June 2026 a Connectivity Agenda platform was launched to coordinate project pipelines across the whole corridor. In energy, electricity interconnection projects linking the EU with Ukraine and Georgia entered the second list of Projects of Mutual Interest, giving them faster permitting and access to EU funding.

The economic case is not speculative: the Commission's own study reports that trade along the Trans-Caspian route has quadrupled since 2022 and could triple again by 2030 if the right investments are made. Whether they are made is another question. What the report describes is coordination, mapping and platform-building, not construction. Robert Cutler put the underlying problem well in May 2026: the corridor "functions as an integrated operational object, but policy still reaches it in pieces" — transport handled separately from customs, energy separately from digital.⁵

V. Pillar Three: Environment, Climate Resilience and Civil Protection

The third pillar attracts least attention and contains some of the report's quietly significant material. An EU-funded monitoring project carried out sampling to document the effects of the December 2024 Kerch Strait oil spill and the destruction of the Nova Kakhovka dam in June 2023. The report is candid that such sampling in a war zone is "difficult and limited". It is nonetheless building an evidential record of environmental damage that may matter considerably in future reparations proceedings.

Elsewhere the pillar delivered what EU civil protection does well. When Russian strikes on Ukrainian infrastructure contaminated the Dniester/Nistru river — a principal source of drinking water for Moldova — Member States supplied absorbent material, satellite imagery services were activated and protective equipment was released from EU strategic reserves. The delivery of a thermal power plant from Vilnius to Ukraine, the largest logistical operation ever mounted under the Union Civil Protection Mechanism, restored

electrical capacity for around a million people. Moldova and Ukraine also became cooperating countries with the European Environment Agency.

The pillar's weakness mirrors its strength: almost everything in it is either an emergency response or a small cooperation project, and its most ambitious item — large-scale clearance of unexploded ordnance from the seabed — remains explicitly conditional on security conditions that do not exist.

VI. Georgia in the Report

Georgia receives a single paragraph in the report's survey of partner countries. It notes the country's position as a natural transit corridor linking Central Asia to Europe, states that cooperation "has continued to be strongly impacted by the country's democratic backsliding, which has resulted in a de facto halt of the country's EU accession process", records the March 2026 suspension of visa-free travel for holders of Georgian diplomatic, service and official passports, and concludes that Georgia's role "will largely depend on the authorities' willingness to take tangible steps towards improving the situation." Armenia, by contrast, receives an account of a Strategic Agenda, a first summit, a connectivity partnership and a new mission; Ukraine and Moldova opened Cluster 1 of accession negotiations on 15 June 2026.

The visa measure is easily misread: it applies to official passports, not to ordinary citizens, who retain visa-free travel, and it was the first use of a reinforced suspension mechanism that had itself entered into force only in December 2025.⁶

What the rest of the report shows is more interesting. Georgian electricity interconnection appears on the Projects of Mutual Interest list, and Georgia participates in cross-border logistics and climate projects and in the Horizon Europe regional funders' network. The dual status is deliberate. Where cooperation requires trusting a government, Georgia has been removed from the Strategy; where it runs through municipalities, universities and research institutes, it continues. That separation sits awkwardly with the Strategy's own geography, since the eastern shore of the sea its corridor must cross is Georgian — a tension visible in the stalled deep-water port at Anaklia.⁷

VII. Funding, Measurement and the Report's Silences

The criticism made of the Strategy from the outset was that it had no money of its own. The German Marshall Fund noted in June 2025 that it contained no action plan, no implementation timeline and no dedicated budget.⁸ The European Economic and Social Committee put it more sharply in December 2025: the Strategy's major constraint is that it rests entirely on instruments already committed under the 2021–27 multiannual financial framework, resources the Committee judged "fragmented, insufficient and ineffective" for the objectives set and in many cases already spent. It called for funds to be ringfenced in the 2028–34 framework and warned that the initiative risked being symbolic rather than transformative.⁹ The Committee of the Regions followed in March 2026 with a similar call.¹⁰

The report acknowledges both opinions in one sentence and engages with neither. It contains no discussion of the next financial framework, no request for dedicated resources and no assessment of whether existing instruments proved adequate. The one question every external critic had asked in advance goes unanswered.

The second silence is methodological. There are no indicators, no baseline against which year one is measured and no target for year two. The Committee had predicted precisely this: absent an action plan, implementation "will be difficult to assess and monitor."⁹ The practical effect is that the report cannot be wrong. Every item in it is accurate and every item counts as progress, because nothing establishes how much progress was expected. That is a defensible way to write a first report. It will not be defensible in a second.

Conclusion. Progress Measured in Engagement Rather Than Outcomes

Judged against the modest thing the Strategy actually was — a strategic approach, not a strategy, without dedicated funding¹¹ — the first year has gone about as well as could reasonably have been expected. The region now has a ministerial format it did not have before, a coordination platform for the Trans-Caspian corridor, an evidence base for corridor investment, a concept for a maritime security hub and a demonstrated instrument for defending elections against interference.

Judged against what the region needs, it is thin. The hub is a concept. The corridor investment is mapped rather than built. The largest financial commitments were made by other policies for other reasons. The environmental flagship waits on a ceasefire.

The report is best judged by what it makes possible rather than what it records. It establishes an official account, commits the Commission and the High Representative to a second ministerial in late 2026, and leaves in place an architecture that a properly funded strategy could inherit. That inheritance is the real test, and it falls due in the negotiation of the 2028–34 financial framework rather than in anything described in these pages. If the Black Sea emerges from that negotiation with resources of its own, the first year will look like groundwork. If it does not, this report will read in retrospect as the moment the Union catalogued its activity in the region carefully enough to disguise the absence of a decision.

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¹ **European Commission and High Representative, JOIN(2025) 135 final** - Joint Communication on the European Union's strategic approach to the Black Sea region, 28 May 2025 — the Strategy whose implementation the 2026 report assesses. eur-lex.europa.eu, CELEX:52025JC0135

² **EU Awareness Centre, 'EU strategy for secure, prosperous and resilient Black Sea region'** - Dr George Robakidze, 31 May 2025 — this publication's analysis of the Strategy at the time of its adoption. euawareness.org

³ **European Commission and High Representative, JOIN(2026) 15 final** - Joint Report to the European Parliament and the Council on the implementation of the EU strategic approach to the Black Sea region, Brussels, 3 July 2026. eur-lex.europa.eu, CELEX:52026JC0015

⁴ **GlobalFocus Center, 'From Strategy to Action: Implementing the EU Black Sea Strategic Approach'** - Roundtable report on the Maritime Security Hub's undefined parameters and the necessity of Georgian, Turkish, Ukrainian and Moldovan participation in regional maritime awareness. global-focus.eu

⁵ **Robert Cutler, 'Europe Needs to Make Its Black Sea Strategy Work'** - Strategy International, 22 May 2026, on the gap between declared strategy and corridor implementation, and on Georgian port capacity. strategyinternational.org

⁶ **Commission Implementing Regulation (EU) 2026/496** - Temporary suspension of the visa exemption for Georgian holders of diplomatic, service and official passports, in force 6 March 2026 for twelve months; European Commission and EEAS statements of 6 March 2026. eeas.europa.eu

⁷ **Salome Samadashvili, 'Securing the EU's Black Sea coast'** - European View, 2026, on the Anaklia deep-water port project and the argument that enlargement is the EU's principal Black Sea security instrument. [journals.sagepub.com, doi 10.1177/17816858261439474](https://journals.sagepub.com/doi/10.1177/17816858261439474)

⁸ **German Marshall Fund, 'The EU's New Black Sea Security Strategy: Right Goals, Unclear Means'** - GMF commentary, 2 June 2025, on the absence of an action plan, implementation timeline and dedicated budget. gmfus.org

⁹ **European Economic and Social Committee, opinion on JOIN(2025) 135** - Opinion adopted in plenary, 3–4 December 2025. Source of the assessment that the Strategy rests on financial instruments that are "fragmented, insufficient and ineffective". eesc.europa.eu

¹⁰ **European Committee of the Regions, opinion CDR 2757-2025** - Opinion adopted March 2026, calling for structured and well-resourced implementation of the Strategy. cor.europa.eu

¹¹ **Daniel Gleichgewicht, 'The European Union's Black Sea strategy'** - New Eastern Europe, 8 January 2026, on the significance of the Strategy being a "strategic approach" rather than a strategy. neweasterneurope.eu