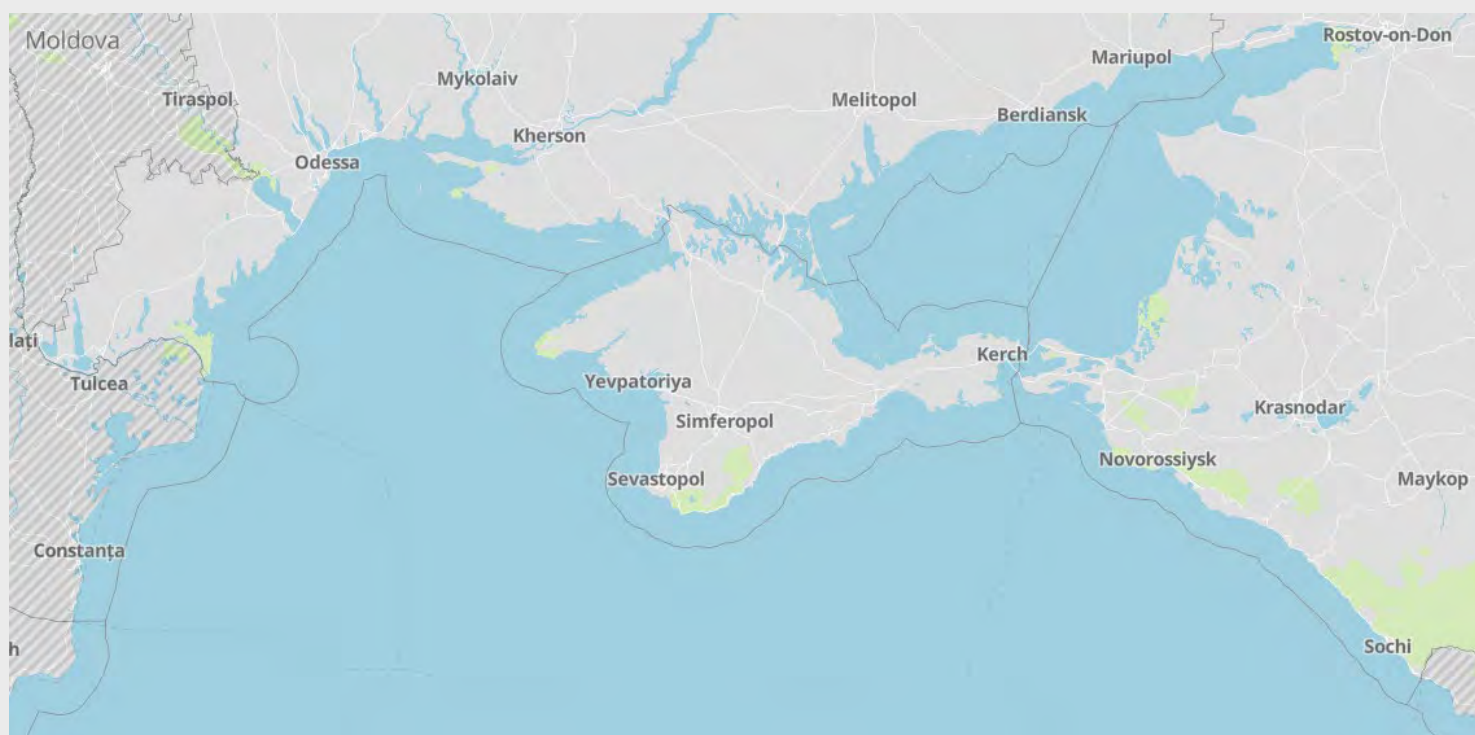


Northern Black Sea and Russia Ports Threat Assessment

Port operations and security overview

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Overview of current situation

Brief update:

The overall threat picture remains unchanged, although the past week there were several reported attacks again Odessa city – but no indication of incidents involving port facilities or maritime operations. Ukraine will celebrate Easter on Sunday 05 May.

Russia has continued to target Ukrainian civilian infrastructure, countrywide but particularly in Odessa Oblast. Some reports note that likely half of Ukraine's energy infrastructure has been damaged. Actual operational impact including disruption to maritime related operations is likely to vary locally. Attacks against Ukrainian cities intensified in April and is likely to continue – until Ukraine is able to re-establish an expanded use of their air defences.

The increase in Russian attacks, against Ukraine's Black Sea coast, is likely in response to the increase in vessel transits to exporting Ukrainian Black Sea ports. However, recent Russia attacks have included what appears to be the use of more indiscriminate munitions which raises the likelihood of collateral damage.

A peace summit is understood to be taking place in mid-June in Switzerland – Russia, who has not been invited to join, has stated the summit is pointless without its presence.

Elsewhere in the region, protests in Georgia have flared up again, following the governments second attempt to pass a bill which would require organisations which received more than 20% of their funding from outside of Georgia as agents of foreign influence. The first attempt to pass the bill by the government was in March 2023, but the bill was withdrawn following protests. Some maritime operations were disrupted as a result of the 2023 protests.

Ukrainian 'Humanitarian Corridor'

The threat picture for the ports connected to the 'Humanitarian Corridor' remains the same.

The recent Russian attacks underline that drone and cruise missile paths continue to cross the corridor and while direct targeting is less-likely, collateral damage from malfunctioning or downed drones and missiles cannot be ruled out.

Although grain exports were reported down in March, the month saw the highest combined number of port calls to the exporting Ukrainian

Black Sea coast – for over a year, when reviewing available AIS data.

Backdoor diplomacy is still understood to be ongoing to find a mutually beneficial solution for safe passage for maritime trade in the Black Sea. Any future agreement would ideally support the current transits, with a more formalized structure and arrangements to adhere to – which in theory should clarify the operational situation for trading in the Black Sea.

The likelihood of disruptions and the threats resulting from military operations are expected to remain until security guarantees are made. Such guarantees should address the threat of Russian actions towards vessels trading in the Ukrainian Black Sea and Danube ports, as well as threats against ports and port infrastructure. It should therefore be assumed that there remains an increased threat towards maritime trade in the NW Black Sea and near the conflict area, in particular.

Russian tactics related to maritime trade in the Black Sea are expected to be limited to ensuring the passage of their vessels and traffic to Russian ports and the Sea of Azov. Attempts to disrupt any scheduled flow of vessels transiting to Ukrainian Black Sea ports, is still assessed as possible, potentially by harassment, GPS signal spoofing or the use of warning shots in extreme cases.

Ukrainian forces continue to target Russian military installations on Crimea. This is expected to continue to occur. Russia still maintains a relatively strong presence in the Black Sea including extensive capabilities to covertly release mines or other munitions into the unilateral corridor. The use of submarines, for such deployment, will likely also be influenced by the risk to surface vessels due to Ukrainian anti-ship capabilities. However, under current circumstances, it is unlikely that Russian Naval capabilities can uphold any blockade or strict inspection regime related to the NW Black Sea or the unilateral corridor, especially with continued Ukrainian focus on assertion of control of their territorial waters. Any overt rhetoric of threats in the area, real or not, are still assessed as attempts to influence threat perception and willingness to undertake voyages into the corridor north of 45-21 in particular, as well as in the wider Black Sea. However, this is generally considered unlikely, especially due to likely international condemnation and the escalatory nature of such an act.

The coordinated insurance mechanism between Ukraine and a syndicate of United Kingdom marine insurers is intended to reduce the war-risk premiums when transiting to the Ukrainian Black

Sea ports of Odessa, Chornomorsk, Pivdenny, and Ukrainian Danube ports.

Black Sea:

There were no developments during the past week that changed the current threat picture.

Local weather conditions are known to have disrupted some maritime operations and will continue to highlight concerns of possible drifting mines, where mines may dislodge from their moorings or disperse already drifting mines, over a greater area.

Ukrainian forces have, in the past week targeted Russian occupied Crimea and are likely to continue this pressure and focus of gaining more firm control of the maritime domain. This will likely continue to be a key priority for them, as this will provide more definite security circumstances for any future shipping corridor to Ukrainian Black Sea ports. Russian forces are likely to continue to focus on countering the Ukrainian efforts.

A chart of the current 'humanitarian corridor', as published in the Annex to the IMO Circular Letter No.4748, can be found in Annex 2 of this report.

Attacks on Ukrainian civilian infrastructure, particularly the electricity grid, are known to previously have impacted port power supply, which in turn has halted operations. Given the constant unpredictability, similar future disruption cannot be ruled out. The threat from military operations, particularly in the NW area, but also the wider Black Sea area, is still considered severe. This includes the continued threat of reported sea mines in the Black Sea and various military operations and engagements in the NW Black Sea which have become more common after the Russian withdrawal from the BSGI. This includes frequent reports of the movement of UKR naval drones and special forces, and Russian assets patrolling to counter these movements.

The Ukrainian military continues to launch operations targeting Russian forces in the south and east of Ukraine including in occupied Crimea – indicating a likely intention to increase control of the area.

Ukrainian air-raid alerts are reported throughout Ukraine almost daily. The continued high likelihood of collateral damage to vessels increases with the ongoing intensity of the Russian aerial bombardments of Ukraine.

No further updates on the Task Force (Mine Countermeasures Naval Group Black Sea – MCM Black Sea) involving capabilities from Bulgaria,

Turkey and Romania. Local weather conditions continue to cause concerns for drifting mines as local weather conditions often lead to new sightings as mines become untethered from anchors and begin to drift. While a connection to the war is likely, the exact origins of individual mines are uncertain. There is also doubt about the potential number of mines deployed in the Black Sea, but the sightings and ongoing efforts of disposals, highlight that mines are a threat.

Conflict-related implications when operating in the Black Sea are likely to continue – with continued varying degrees of naval presence and activity, congestion and delays when transiting the regional straits and rivers, congestion at other regional ports due to the volume of diverted traffic, the impact of sanctions on trade to and from Russia, and complications with crew changes.

Sea of Azov:

The Sea of Azov is still assessed to be limited in access for normal commercial maritime traffic.

The Ukrainian Sea of Azov ports (Mariupol and Berdyansk) are still controlled and operated by the Russian military and occupation authorities. While the Russians have previously announced the ports to be open and being rebuilt – with claims of increased traffic – the actual operational state is unclear. Vessels given access into these ports are known to have transported stolen Ukrainian cargo, most notably steel and metal products, as well as grain. Naval movements into the ports are likely to occur. Incidents of long-range attacks and sabotage in both cities are known, but unverified.

The Ukrainian authorities have previously stated that they are monitoring vessels going to occupied Ukrainian ports, in the Sea of Azov, and that these vessels are viewed as legitimate military targets.

Traffic is known to be halted on the Kerch Strait bridge due to potential security incidents, and the bridge remains a coveted target by the Ukrainian military – highlighted by the 26 December incident. Similar situations are likely to occur again in the event of future attacks or likelihood thereof. Russia has announced that vessels which have loaded anywhere outside of Russia, will not be permitted to pass through the Kerch Strait. Disruption and delays to transits of non-Russian-flagged vessels are known to occur. Direct targeting of Russian (proper) ports, port cities, or nearby areas is generally considered unlikely, although the potential targeting of Russian Black Sea ports is assessed to be more likely. Russian Black Sea ports are understood to be operating at ISPS level 2.

BSGI: Black Sea Grain Initiative

The UN BSGI remains suspended. However, it is understood that negotiations are ongoing, attempting to find a future format – see section on ‘Humanitarian Corridor’.

Information regarding past vessel movements and goods transported, as part of the BSGI, can be found on the UN-dedicated website below¹.

<https://www.un.org/en/black-sea-grain-initiative/vessel-movements>

Ukraine:

Port information is located in the port table.

Timing of promised military supplies is still a reported issue and likely to influence and impact future operations by the Ukrainian forces – although an ongoing focus of the security of the Ukrainian Black Sea export corridor, is likely to continue to have priority. Ukrainian ports generally remain shut for normal operations, but Odessa, Pivdennyi (formerly Yuzhny) and Chornomorsk, are handling operations connected to the Ukrainian ‘humanitarian corridor’. Vessels are not likely to be directly targeted and any specific impact of reported attacks on the Ukrainian Black Sea and Danube port infrastructure, following individual incidents, is likely to vary, though likely to continue to complicate operations to varying degrees.

Russian drone and missile strikes against Ukrainian civilian infrastructure has continued during the past week and will likely continue to occur. While only limited reports of strikes against port and maritime infrastructure have been reported, it is uncertain if this is due to Ukraine being able to shoot down the drones targeting ports, or if Russia are actively avoiding targeting of ports.

Ukrainian Danube ports are open and operating, although it is understood that an ongoing shortage of pilots and local weather conditions does cause operational disruption and delays. Future Russian attacks targeting the Ukrainian Danube ports are possible. Attacks have been the most common earlier, and anti-air defenses in and near the ports usually work through the night in the case of Russian drone attacks. Collateral damage to vessels in the ports is possible – either from strikes on the ports or vessels may be hit by stray or disabled drones.

In case of a dramatic change on the ground, Russia may limit the strategic bombing and use long-range

precision weapons and drones against military targets closer to the front line.

Martial law remains in place – with some local night-time curfews in place. All Ukrainian ports are operating at ISPS level 3 following the communication to the IMO by the Ukrainian authorities.

Russia:

Port information is located in the port table.

Several media outlets covered the story of a fire on board the Russian Corvette the Serpukhov, in the Russian enclave of Kaliningrad, alleged to be started by the Ukrainian military intelligence – this has not been verified. Ukrainian efforts against Russian maritime assets have been focused on degrading Russian capabilities and limiting the room to maneuver in the Black Sea, and Ukrainian naval efforts against the Russian navy are often reported. Naval drone attacks against vessels and areal, missile or air strikes against Russian maritime targets, predominately at Crimea and near Kerch, are expected.

The Ukrainian effort to attack Crimea and the Kerch Strait in the Autumn 2023 to Winter 2024, is likely to have exerted a great deal of pressure against the Russian Navy in the NW Black Sea. Especially attacks on Sevastopol, the historic homeport of the Black Sea Fleet, seem to have had a significant effect, as the Russian navy is reported to have retreated from the port and moved its remaining vessels to Novorossiysk further east. This will give the Ukrainian military more freedom to operate in the NW Black Sea, although Russian aviation and other strike capabilities remain in the area.

The Ukrainian intent to strike at, and the availability of capabilities, to reach Russian targets highlight that the immediate threat towards Russian Black Sea ports must be taken into account. With the moving of the Russian Black Sea Navy, Ukraine is likely to focus more on strikes to the East of the Black Sea, and ports in this area.

While intended targeting of civilian vessels is still assessed as unlikely, collateral damage or mistaken targeting is possible, by both parties – including a Ukrainian willingness to attack ‘civilian’ cargo vessels operated by the Russian military – such vessels are often sanctioned due to activities related to the Syrian Civil War and the transport of military equipment.

¹ Risk Intelligence is not responsible for third party content.

It is uncertain to what degree countermeasures and security will impact operations in Russian ports. However, reports indicate that the Russian authorities have raised security concerns over UKR naval drones. An example is the port of Feodosia near Kerch, where there now is a ban on entering the waters closer than 1km from the port in small vessels and crafts. This adds to previous reports of gunfire in Feodosia and various reports of drone sightings, which are known to result in the closure of the Kerch Strait Bridge. The actual presence or sightings of drones are uncertain.

Overall, because of the threat to Russian ports, and the increased security, there is a chance that guards and troops will be overly nervous or paranoid about attacks and security incidents. The hyper-vigilant state can lead security personnel to perceive benign actions or individuals as potential threats, thus increasing the likelihood of unjustified use of force – this extends to sailors and vessels.

There are also known reports of Russia sinking some old ferries or similar in the Kerch Strait, as an attempt to create a bulwark against the Ukrainian naval drones. While this most likely won't affect the regular shipping lane underneath the bridge, it highlights that Russia is stepping up security and is taking the threat of Ukrainian drones extremely seriously.

Extra scrutiny against crew, and passengers from the West in Russian ports, has previously occurred. Extra focus is expected against Ukrainian crewmembers, who are required to be brought ashore and questioned by Russian authorities before berthing. Some crews on merchant vessels in the Black Sea are known to have been questioned on their attitude towards Russia and the invasion of Ukraine. Content on phones and electronic devices, as well as messages on social media and other text services, may be investigated to establish anti-Russian sentiment.

Reports of activism against vessels transporting cargo to or from Russia are known. This is predominately when vessels with Russian cargo call European or Western ports. Similarly, there have been previous incidents of vessels carrying oil and gas products from Russia being targeted by environmental/peace activists at sea or while underway as recently illustrated by the cruise ship calling at Batumi. Port workers and industrial action in the form of refusal to service the vessels once it lands in Western ports is also likely. Hacktivists targeting companies trading with Russia cannot be ruled out.

Outlook:

Russian attacks on civilian infrastructure in Ukraine have continued during the past week and unlikely to diminish until Ukraine is able to re-instate their previous air defense capabilities. The timeframe for the delivery of additional support packages will be critical for the future of Ukraine's defense. Nevertheless, Ukrainian focus, both politically, and in terms of securing further global political support, and funds to sustain its war efforts, but also militarily to attaining more control of security in the maritime domain, will likely continue to be key priorities. To bolster any future support uncertainties.

Any future increase in naval activity is likely to be linked to what will be considered the most beneficial for the wider objectives. Any immediate or significant changes to the present circumstances are not assessed as likely. Russian targeting of Ukrainian infrastructure, including port facilities, is likely to continue to varying degrees – throughout the country. Russia is likely to continue to attempt to disrupt or discourage vessels transiting the Ukrainian 'humanitarian corridor', although such attempts are also likely attempts to distract the Ukrainian military from their operations in the NW Black Sea – which continues to indicate an increased focus on establishing area control.

The volatility to operating in the Black Sea is unlikely to change, as both Ukraine and Russia will attempt to assert dominance and disrupt the activities of the other side as much as possible.

Given the likely continued focus by the Russian military to target Ukrainian port cities and facilities, to keep the pressure on Ukrainian abilities to export their goods – and if the disruption of port operations, due to the shelling, is not considered to be effective enough, additional intensity or other tactics, such as forced inspections or direct attacks on merchant vessels, may become more likely, as it seems the ultimate goal of the Russian efforts are to deny Ukraine the income from their exports. Any tacit agreement from the Russians on transits is unlikely unless outside pressure or negotiated separately.

Ukrainian strikes are likely to continue against Russian infrastructure and storage sites to disrupt Russian supply lines and military operations in Southern Ukraine. Much of this can be focused on the Sea of Azov and Crimea, and future major attacks against maritime infrastructure to keep the pressure on Russian supply lines in the area, are likely.

The announced changes to consular services for military aged Ukrainian men, living outside of Ukraine, is assessed as an attempt to both

encourage Ukrainians to return to join the armed forces and to discourage more men, from leaving the country.

Future sanctions towards Russia may affect the overall security dynamics of the Black Sea. If further sanctions mount, Russia could still respond by restricting Russian ports for vessels affiliated with or connected to EU/NATO/Western countries or flags. In such a scenario, any effect on vessels in Russian ports is uncertain, although detention of vessels could be a possibility – threats of this have been reported. Russian authorities might do extensive checks and controls of Western vessels as a form of harassment.

The war in Ukraine has proven it can take on additional dimensions – examples likely connected sabotage include the Nord Stream 1 and 2 pipeline incidents in the Baltic Sea, in late September 2022 and the January 2024 incident at the Ust-Luga terminal, near St. Petersburg – this means that additional hybrid-warfare means may be used not just concerning Ukraine and the Black Sea, but also elsewhere in the world- especially where the international tensions between Russia and the West/NATO are prevalent. These may include, but are not limited to, harassment, espionage, cyberattacks, and sabotage of and against maritime assets and infrastructure. This has the potential to affect maritime security negatively.

Annex 1 – Illustration of reported mined areas

Annex 2 – Announced temporary corridor from UKR Black Sea ports

Annex 3 – Reported Kerch Strait inspection area

Annex 4 – Incidents

Ukraine and northern Black Sea ports

Refer to the following page for definitions and information on sanctions/commercial restrictions

Port	Current port situation	Current local situation	Operations	Security
Odessa	Regular cargo operations understood suspended for commercial operations, but operations related to the unilateral UKR corridor are known.	Russian strikes do occur against targets in the Odessa Oblast, including some direct targeting of Odessa city and port facilities. Further targeting and increased focus as part of military operations cannot be ruled out.		
Pivdenny	Regular cargo operations understood suspended for commercial operations, but operations related to the unilateral UKR corridor are known.	Located in the Odessa Oblast where Russian strikes have taken place, including recent reports of attacks on port facilities and previously on the nearby city of Yuzhny. Further targeting in the area and increased focus as part of military operations cannot be ruled out.		
Mykolaiv	Closed. Cargo operations suspended for commercial operations.	In control of Ukrainian forces, but strikes and shelling, by Russian forces, of targets in or near the city, has been reported.		
Mariupol	Disputed operational status.	Controlled by Russian forces and part of annexed territory. Actual operational status is disputed with Russian authorities reporting the port to be open, although this is with very limited traffic prioritized by the Russian state. Reports indicate the rebuilding of the port facilities by Russian military and contractors.		
Chornomorsk	Regular cargo operations understood suspended for commercial operations, but operations related to the unilateral UKR corridor are known.	Russian strikes have occurred against targets in the Odessa Oblast. Further targeting in the area and increased focus as part of military operations cannot be ruled out.		
Ukraine Danube ports	Ukraine Danube ports are understood operating and handling ship calls via the Danube, and the Sulina and Bystre Canals.	<p>Incidents involving mines have occurred in the Black Sea near the canals. Russian strikes do occur against the ports of Reni and Izmail. Previous incidents indicate a Russian priority of targeting the logistics infrastructure on or near the Danube, including port infrastructure. Collateral damage to vessels is possible. Local weather conditions and pilot shortages also impact maritime operations.</p> <p>ISPS Level 3 is in place, as communicated by the Ukrainian authorities. Delays and congestion have been reported in relation to port and canal operations.</p>		

Port	Current port situation	Current local situation	Operations	Security
Kerch Strait	Open for navigation within but closed for unauthorised transit. Ports located within the Strait are reported to be operating. Inspection regime and additional security measures are in place.	UKR naval drone or missile strikes against the Kerch Strait Bridge and nearby naval installations do occur. Attacks are less likely to directly target commercial maritime traffic, although collateral damage cannot be ruled out, with Ukrainian authorities reiterating the threat towards vessels carrying military related equipment to Ukrainian Azov ports Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones or cruise missiles, is possible. Russia has announced transit restriction of vessels which are not loaded in Russian ports. Scrutiny against crew is possible *. See Annex 3 for reported Kerch Strait inspection area.		
Russian Black Sea ports	Open with restrictions. Additional security measures are in place.	Ports operating at ISPS level 2, some operational delays possible. Collateral damage to vessels may occur in case of incidents. Scrutiny against crew is possible *. Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure (notably energy infrastructure), using naval drones or cruise missiles, is possible.		
Russian Sea of Azov ports	Open with restrictions. Sea of Azov is currently closed to unauthorized navigation by the Russian authorities. Additional security measures are in place.	Ports operating at ISPS level 2, some operational delays possible. Collateral damage to vessels may occur in case of incidents. Scrutiny against crew is possible *. Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones or cruise missiles, is possible.		
Temporary corridor from UKR Black Sea ports	Operational status is reported to be open – though influenced by operational circumstances in the NW Black Sea.	While the corridor itself is outside the regular “pre-war” conditions of the Black Sea, it is reported to be running without considerable issues. Any tacit agreement from Russia on current transits are unknown, and further Russian acceptance is unclear if the increased tempo of Ukrainian strikes on Russian assets in the Black Sea continues. Military activity in and near the corridor is possible.		
Constanta	Open.	Operating, with additional cargo diverted to Constanta due to closed Ukrainian ports. Congestion should be expected, and although this is being managed, it could lead to delays.		

* Constraints and demands related to vessels with Ukrainian crewmembers. Russian crew with previous military service may be questioned by authorities withheld as part of Russian mobilization efforts. ** Risk Intelligence is not responsible for third-party content.

Operations and Security definitions

Operations:

Green – Operations in the area are ongoing normally with no significant issues.

Yellow – Some delays or disruptions in the area may be expected, which could be due to limitations to, for example, port operations and/or congestion in the area, or other difficulties with access or operating at the required ISPS level or complying with other procedures either at port or offshore.

Red – Operations have been significantly disrupted and ports or areas might be closed or only partially operating due to restrictions, blockades, lack of functioning infrastructure, personnel disruptions, and access concerns, or other issues preventing all or most operations.

Security:

Green – The area is secure and there are no direct or indirect security threats in the port vicinity or offshore area. Low threat to vessels/personnel.

Yellow – There are no direct security threats but there are possible indirect threats in the vicinity, particularly but not limited to conflict taking place in proximity either on land or offshore. Moderate threat to vessels/personnel.

Red – Direct threats are possible to the port or area and/or its immediate approaches, including collateral damage in the immediate area or direct attacks that could target infrastructure and vessels at berth/anchorages/underway. High threat to vessels/personnel.

Note on sanctions and commercial restrictions

Sanctions and commercial restrictions are being imposed on Russia in response to its invasion. These sanctions are evolving and will affect ongoing business operations in many complex legal ways. Sanctions are being applied to individual Russians, business entities, and to certain Russian export products (such as oil products). There are also restrictions on specific nationalities (such as US citizens) engaging in certain activities, restrictions on payments (in certain currencies and through certain institutions), and restrictions on Russia's import of particular dual-use items and technologies. Port entry bans for Russian vessels are being implemented (in the UK, for example).

The fine print of sanctions and restrictions might affect chartering arrangements in unexpected ways, depending on the connection to Russia. These issues, as well as insurance issues for operating in war risk areas, are not covered in this report and might need to be assessed separately to reduce the risk of exposure.

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Annex 1:

Reported mined areas



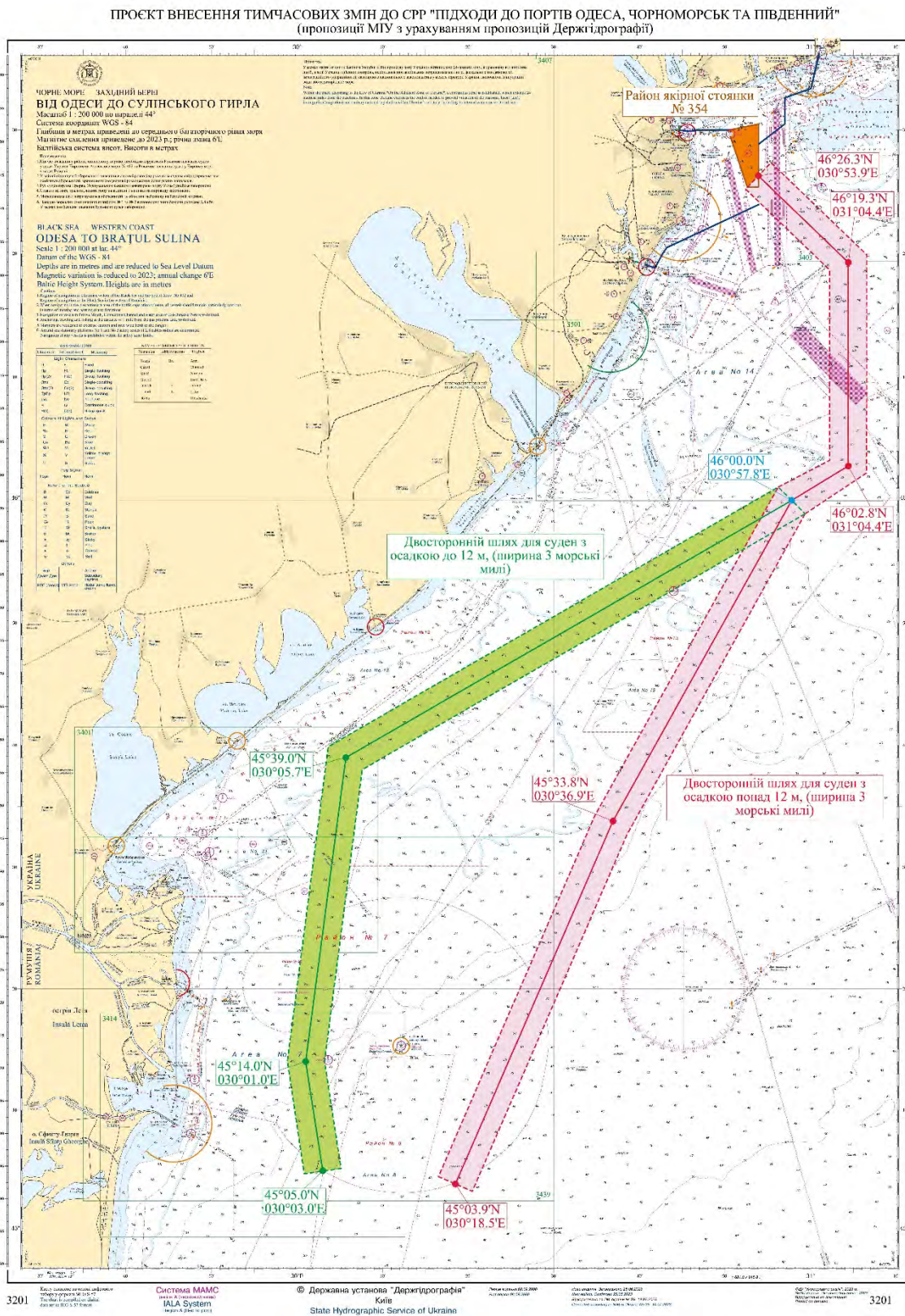
Risk Intelligence (Illustration for visual guidance only)

NAVAREA III: See above for visual guidance on mined areas according to the Spanish flag administration (NAVAREA III 0092).

Mined areas are most likely a combination of deeper sea mines and shallow water mines for anti-amphibious operations as well as on beaches. Mines in the sea are most likely cabled or anchored and under control.

Please also note that active NAVAREA III warnings include a warning of possible drifting mines (NAVAREA III 0122) for Northwest, West, and Southwest areas of the Black Sea.

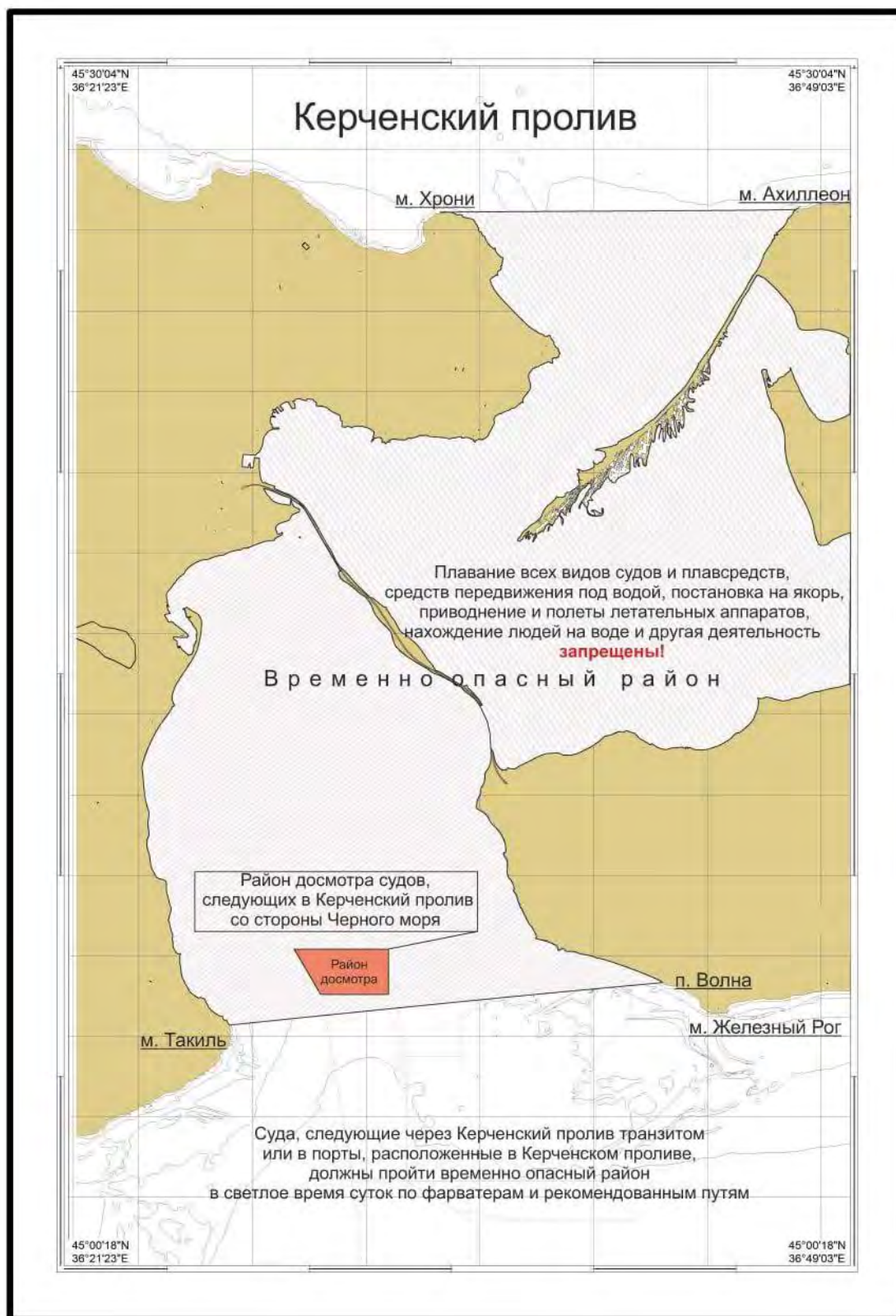
Annex 2:



The above chart shows the announced temporary routes for civilian vessels to and from Ukrainian Black Sea ports. The Ukrainian Navy emphasizes that war risks, including mines, remain. Further details can be found in the IMO Circular Letter No.4748 (Source: IMO Illustration for visual guidance only)

Annex 3:

Reported Kerch Strait inspection area, as announced by the Russian authorities 02 August 2023.



Annex 4:

No maritime related incidents were recorded during the past week.