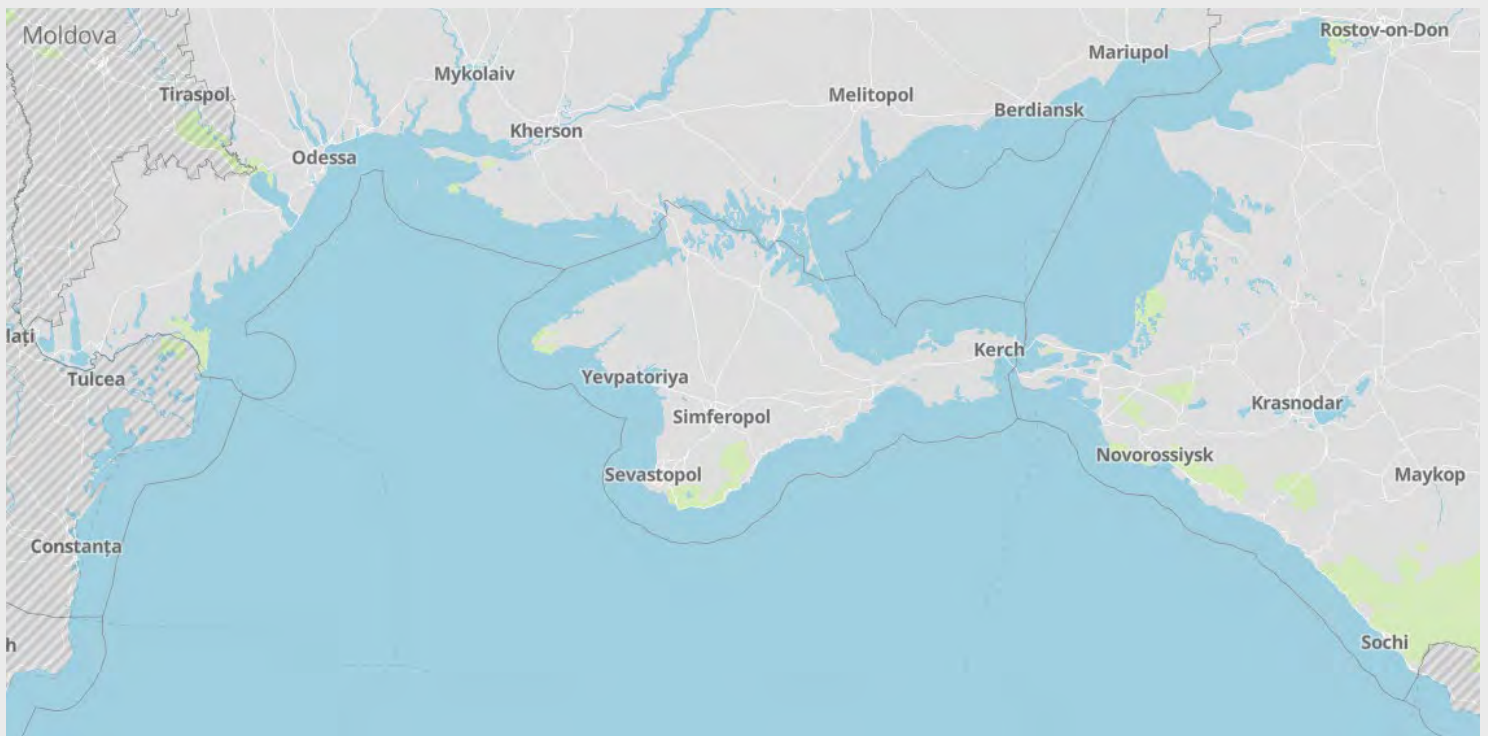


Northern Black Sea and Russia Ports Threat Assessment

Port operations and security overview

Date and time of latest intelligence included in this report: 05 September 2024 - 09:00 UTC



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Overview of current situation

Brief update:

Details about recent incidents can be found at the end of the report. Current operational and security conditions in ports can be found in the ports table.

The reported incident on Novorossyisk, does not change the overall threat picture, in relation to commercial maritime operations in the Black Sea. However, there is a current perceived increase in tit-for-tat attacks by both sides, likely Russian attempts to further retaliate the Ukrainian incursion into Russia, and Ukraine attempting to keep pressure on Russian forces, with the hope of relieving the pressure on their forces elsewhere.

Recent reports include an announced reshuffle of the Ukrainian government. This has included some notable resignations of high-profile ministers – the reasons for which are allegedly varied, with some expected resignations and others citing personal circumstances. The government's overall policies and strategic objectives are expected to remain – but approaches to implementation may change.

It remains assessed that the Russian intension with its attacks on Ukraine's infrastructure is to weaken the Ukrainian readiness for the upcoming winter, whereas the Ukrainian attacks on Russian infrastructure is assessed to mainly disrupt the income from this industry. For Ukraine this has heightened the issues with the Ukrainian energy infrastructure.

Locally scheduled brown- and blackouts have been reported and should be expected. Impact on port operations is likely to differ locally, but a degree of impact should be expected and likely to continue in the foreseeable future. The ability for Russia to continue the targeted attacks on Ukrainian energy infrastructure, remains dependent on Ukrainian ability to protect the same facilities, which is also linked to their overall available air-defense capabilities.

Vessels continued to use the Ukrainian Corridor, during the past week.

It is assessed that both the Ukrainian and Russian forces are likely to continue to attempt to position themselves for the upcoming winter months. A recent statement by a Russian official claimed that the Ukrainian incursion ruined any chance of peace negotiations. Future similar posturing is likely in the runup to any future Ukraine peace summit, which has previously been mentioned.

Ukrainian Black Sea Corridor

The threat assessment for the ports connected to the Ukrainian Black Sea corridor remains unchanged.

Vessels continued transiting the Ukrainian Black Sea corridor, also known as the Ukrainian 'humanitarian' corridor, which includes the ports of Odessa, Chornomorsk and Pivdenny – during the past week. The general threat level, in relation to vessels transiting the Ukrainian Black Sea corridor, remains assessed as lower. This reflects a more stable and secure passage, resulting in a lower likelihood of incidents directly impacting vessels during the transit. The likelihood of collateral damage for vessels in port is unchanged. This is due to port infrastructure is still assessed as likely targets by Russian drone and missile attacks. The port table reflects these assessments.

The Ukrainian Black Sea 'humanitarian' corridor and participating Ukrainian Black Sea ports are understood to be operational in accordance with the IMO Circular Letter 4748. Local operational differences and issues should be expected.

Russian attacks continue to target Ukrainian infrastructure. Incoming drone and cruise missile against ports and other targets in Western Ukraine are known to cross the shipping corridor and while direct targeting of vessels is not expected to occur, collateral damage from malfunctioning or downed drones and missiles cannot be ruled out.

The likelihood of operational disruptions from power outages, air raid alarms, and other limitations, as well as the threats 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.

A diplomatic follow-up conference, to the Peace Summit, held in Switzerland in June, was held recently, focusing on implementing various agreements made regarding the security of food-exports from Ukraine – including the Black Sea.

Black Sea:

There were no developments during the past week that changed the regional threat picture. Details about recent incidents can be found at the end of the report.

The overall assessment of the security picture for general operations varies depending on the specific operational area of the Black Sea in question. With the threat to maritime operations assessed as lower in the southern half of the Black Sea.

Russian tactics related to maritime trade in the Black Sea are assessed to still 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 though less likely, under present circumstances. However, potential harassment, AIS/GPS signal jamming or spoofing or the use of warning shots in extreme cases, cannot be completely ruled as a future occurrence.

Ukrainian forces continue to target Russian military and oil refinery installations on Crimea and the Russian Black Sea coast. This is expected to continue to occur. Although Russia has withdrawn much of its naval capabilities from the Black Sea to the Sea of Azov, it still maintains enough of a presence in the Black Sea to present an ongoing threat and 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.

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.

The ground offences between Ukrainian and Russian forces along the contact-line, is not assessed as impacting the maritime operations in the Black Sea. Ukrainian forces are likely to continue to pressure Russian forces in the Black

Sea including Russian occupied Crimea to keep their 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.

Attacks on Ukrainian civilian infrastructure are ongoing - particularly the energy grid – which is previously known to also have impacted some port power supply, which in turn has halted port operations. Air raid alarms, prompting people to take shelter, can also disrupt port 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 considered higher than the rest of the Black Sea. 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 aerial assets patrolling to counter these movements.

There remains an ongoing issue with not just floating mines but waterborne objects in general, in the Black Sea, as a consequence of the war in Ukraine. In relation to the MCM operations, some reports note the complexity of the issue, by highlighting the uncertainty of the overall estimated number of mines, which some estimate could be 1000 or more (possibly roughly 50/50 placed by both Russia and Ukraine). Reports of near daily calls to national emergency services, in the other countries bordering the Black Sea and Ukraine of possible mine-sightings highlight that mines underline the complexity. However, it must also be noted that most of these calls do not turn out to be mines.

Conflict-related implications when operating in the Black Sea are likely to continue – with continued varying degrees of naval presence and activity, by both Ukrainian and Russian operations. 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, without prior Russian consent. Future military action in or near the Kerch Strait cannot be ruled out.

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 recently announced the ports to be open and being rebuilt – with claims of increased traffic – the actual operational status 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 Crimea bridge due to potential security incidents, and the bridge remains a coveted target by the Ukrainian military – underlined by previous strikes against the Kerch Strait Area. Russia has increased the physical security of the Crimea Bridge by deploying barges to limit the movement of Ukrainian naval drones.

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.

Ukraine:

Reported attacks during the past week with power-outages and air-raid alarms have occurred throughout the country. As a result, some scheduled power-outages, are understood to have changed on a daily basis and concerns have been raised by the Ukrainian provider of the operational future of the country's energy network, including sufficient supplies and making the network more resilient to aerial attacks.

The reported Ukrainian incursion into Russia continues and is generally considered part of a wider strategy to establish some Ukrainian momentum. Although it remains unclear what kind of impact this may have on the war in the future, it is

less likely to any significant impact on Black Sea maritime operations – although an increase in Russian forces targeting civilian infrastructure including maritime facilities, cannot be ruled out

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.

A Ukrainian attack against Russian maritime targets, predominately at Crimea, near Kerch and in the Eastern Black Sea remain a likely scenario.

It is not assessed that the recent delivery of F-16 will have an immediate effect on the threats in Russian ports or waters.

All significant vessels of the Russian Black Sea Fleet are currently in port in Novorossiysk, for protection against UKR naval and aerial drones. This gives the Ukrainian military more freedom to operate in the NW Black Sea, although Russian aviation and other strike capabilities remain active 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. The assembly of the Russian Black Sea Fleet in Novorossiysk increases the likelihood of major attacks against the naval port.

Videos of naval and aerial drone attacks in Russian ports also highlights the lack of automatic firing systems to counter drones, leaving only light and heavy machine guns manned by troops. Russian anti-air is often fired at near horizontal angles. Therefore, a lot of anti-air fire is going directly into civilian and port areas, across from wherever Russian Naval vessels are positioned. This is likely to lead to damage to port facilities and vessels and may potentially also wound or kill sailors or port workers.

Conflict outlook:

Overall, no incidents during the past week change the current outlook of the security situation for maritime operations in the Black Sea.

Russian attacks on civilian infrastructure in Ukraine, particularly the energy network, have continued with varying intensity during the past week and underline the ongoing vulnerability of the future Ukrainian power-supply, especially regarding the coming winter. These attacks are unlikely to diminish until Ukraine is able to increase their air defense capabilities.

Although the incursion by Ukrainian forces into Russia is ongoing, the Ukrainian advancement is slowing and the general assessment remains that the strategy by both Ukraine and Russia is to continue to attempt to assert dominance and disrupt the activities of the other side as much as possible. This is also likely attempts to position themselves ahead of the coming autumn and winter and too, in the event of any future talks in order to gain as strong a negotiation position as possible.

Ukraine is likely to continue to strike Russian infrastructure throughout the Black Sea by any means available – missiles, naval drones, and aerial drones. These strikes will continue in an attempt to disrupt Russian supply lines and military operations in Southern Ukraine, as well as limiting Russian energy exports and revenue. Much of this will be focused on Crimea and the Eastern Black Sea and the Sea of Azov, and future major attacks against maritime infrastructure to keep the pressure on Russian are likely. It should be noted here that Russian defensive forces will continue to mainly use unguided weapons like cannons and machine guns to counter drone attacks – with considerable potential for collateral damage for civilian traffic caught in the crossfire.

Future attempts by Russia to continue to attempt to disrupt or discourage vessels transiting the Ukrainian ‘humanitarian corridor’ are likely, although such attempts are also likely to attempt 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 Ukrainian government reshuffle is, presently, assessed as unlikely to change the overall strategy, policies – although approach to implementation may change.

Future sanctions towards Russia may affect the overall security dynamics of the Black Sea and Russia could still respond by restricting Russian ports for vessels affiliated with or connected to EU/NATO/Western countries or flags, in response to future sanctions. 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 previously been reported. Russian authorities might do extensive checks and controls of Western, or Western affiliated, vessels as a form of harassment.

The war in Ukraine has proven it can take on additional dimensions. Notably, Western intelligence agencies warn of increased hybrid activity by Russian assets in Europe. This is connected to the increasing tensions between NATO and Russia. It is also likely that Ukraine is using assets to inflict damage on Russian infrastructure far from the Black Sea.

Examples of sabotage likely related to the conflict 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	The port is understood operational in accordance with the IMO Circular Letter 4748.	Russian strikes do occur against targets in the Odessa Oblast, including some direct targeting of Odessa city and port facilities. Future targeting and as part of military operations is expected. The overall security situation remains highly volatile and local operational differences and issues should be expected. Disruptions to operations may occur due to power outages or air raid alarms.		
Pivdenny	The port is understood operational in accordance with the IMO Circular Letter 4748.	Russian strikes have occurred against targets in and near Pivdenny, including targeting of the port. Future targeting in the area as part of military operations are possible. The overall security situation remains highly volatile and local operational differences and issues should be expected. Disruptions to operations may occur due to power outages or air raid alarms.		
Mykolaiv	Closed. Cargo operations suspended for commercial operations.	In control of Ukrainian forces. Russian strikes against military targets and critical-infrastructure targets in or near the city are expected.		
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	The port is understood operational in accordance with the IMO Circular Letter 4748.	Russian strikes have occurred against targets in the Odessa Oblast, although Chornomorsk has not been targeted since July 2023. Future attacks cannot be ruled out. The overall security situation remains highly volatile and local operational differences and issues should be expected. Disruptions to operations may occur due to power outages or air raid alarms.		
Ukraine Danube ports	Ukraine Danube ports are operating and handling ship calls via the Danube, and the Sulina and Bystre Canals.	<p>Incidents involving mines have previously occurred in the Black Sea near the canals. Future Russian strikes against the ports of Reni and Izmail, are still possible in case of a Russian re-focus on the area. Local weather conditions, water levels, 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 but only for authorized 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 stations and critical infrastructure are expected. Attacks are not expected to directly target commercial maritime traffic, but collateral damage cannot be ruled out. Russian defensive fire against drones may hit commercial traffic. 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. Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones, aerial drones, or cruise missiles, is possible. Collateral damage from drones may occur in case of incidents, and Russian defensive fire against drones may hit commercial traffic. Scrutiny against crew 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. Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones, aerial drones or cruise missiles, is possible. Collateral damage from drones may occur in case of incidents, and Russian defensive fire against drones may hit commercial traffic. Scrutiny against crew is possible *.		
Temporary corridor from UKR Black Sea ports	Operational status is reported to be open, in accordance with IMO Circular Letter 4748 – though likely 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).

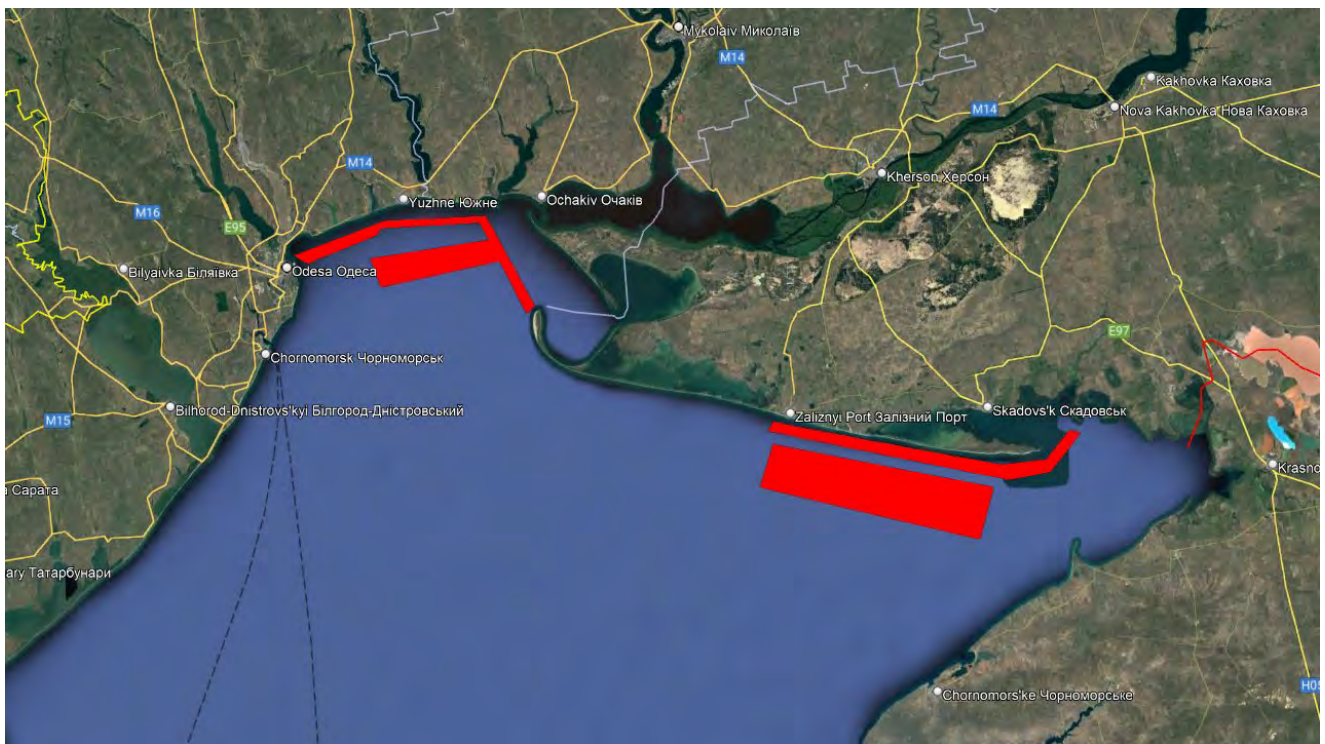
The fine print of sanctions and restrictions might affect chartering arrangements in unexpected ways, depending on the connection to Russia. These issues, as well as insurance issues for operating in war risk areas, are not covered in this report and might need to be assessed separately to reduce the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

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Annex 1:

Reported mined areas



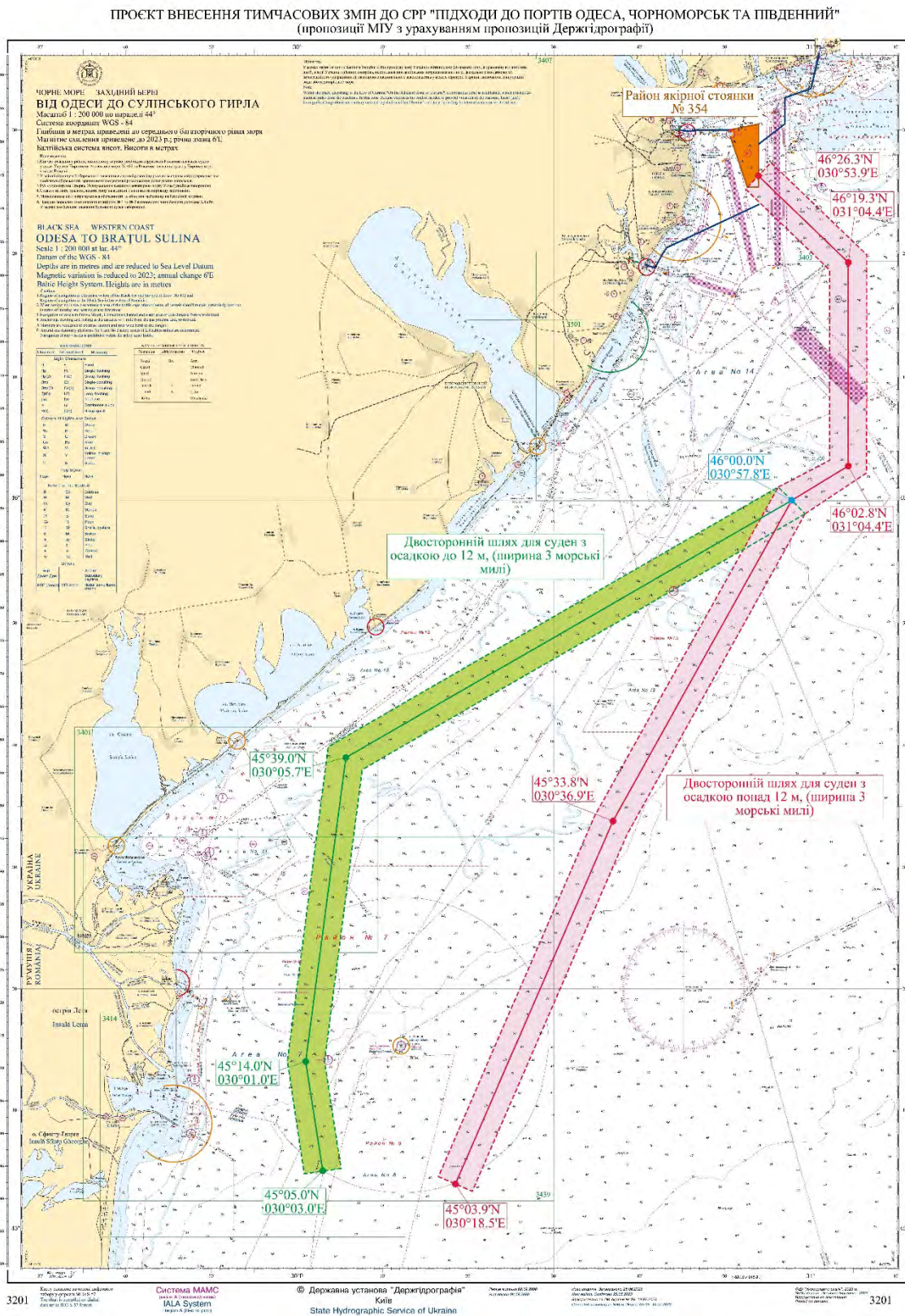
Risk Intelligence (Illustration for visual guidance only)

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.

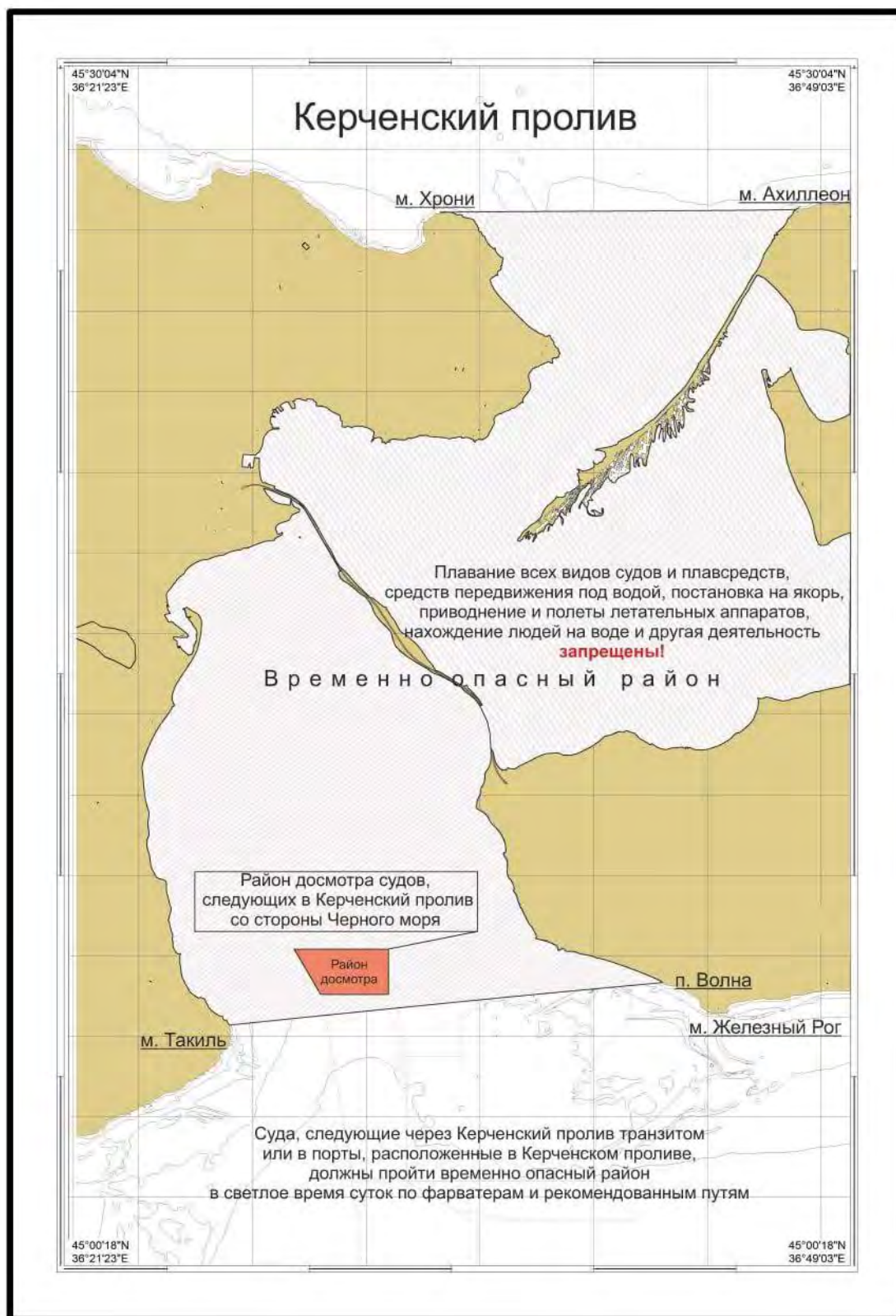
Annex 2:



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.



Ukrainian strike on Novorossyisk reported

September 5 2024



Region: Europe

An Ukrainian strike was reported at the port of Novorossyisk, Russia, at an unknown time on 05 September 2024.

According to various local sources the attack was likely conducted by Unmanned Surface Vessels (USVs) and footage, allegedly from the incident, show defensive gunfire and flares being deployed. Subsequently local authorities are said to have closed off all beach areas to the public.