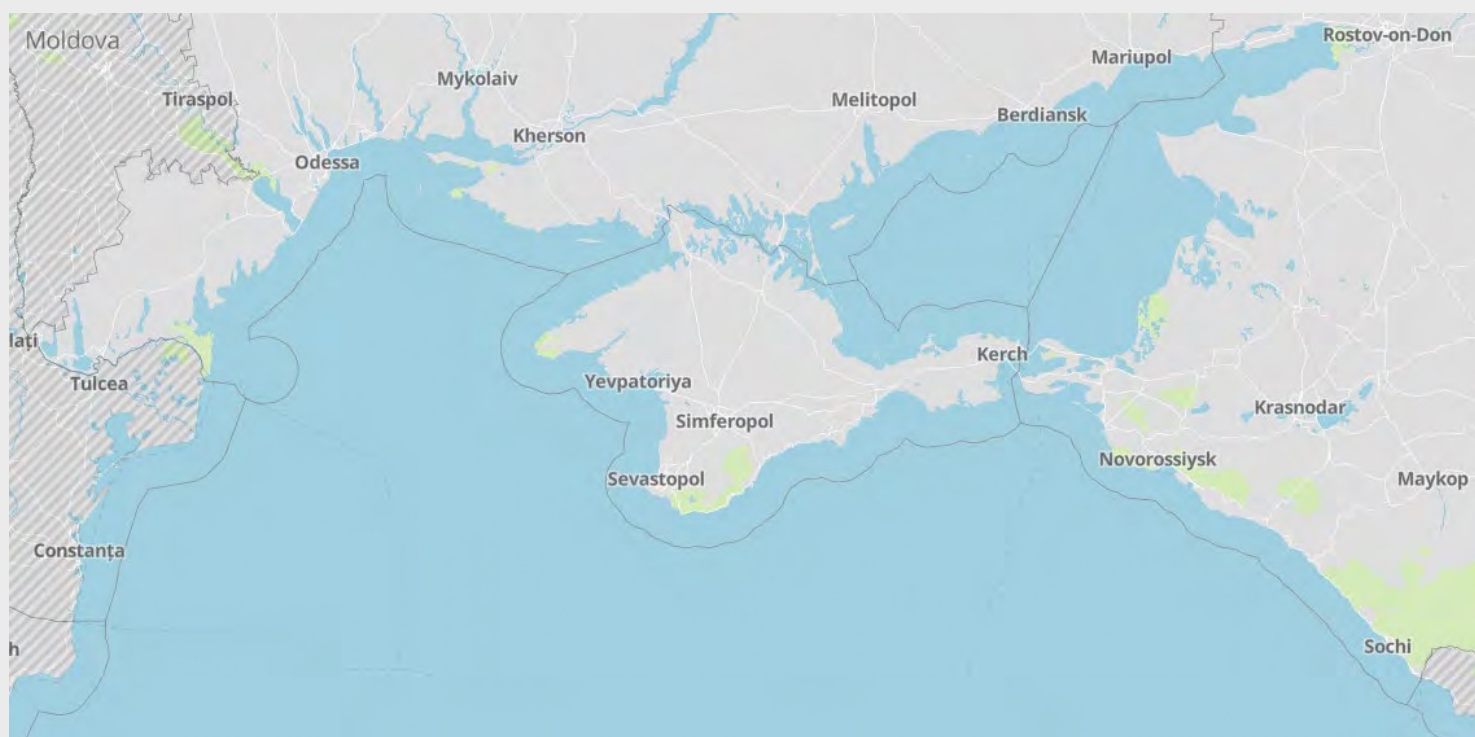


Northern Black Sea and Russia Ports Threat Assessment

Port operations and security overview

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Overview of current situation

Brief update:

Developments during the past week do not represent any change to the current threat picture in the Black Sea. Current operational and security conditions in ports can be found in the ports table.

Prior to the inauguration of US president Trump, on 20 January, there had been much anticipation of how he and his incoming administration might approach the issue of resolving the Russian war in Ukraine. Although there was no specific mention regarding Ukraine or Russia in the inauguration speech, there have been some subsequent comments, which have indicated that the approach is likely to be a combination of “carrot and stick”, towards both Ukraine and Russia. It is assessed that this approach is an attempt to obtain strong, if not maximum, leverage to pressure both parties into negotiation. Recent comments by US president Trump and team regarding the war in Ukraine, do not currently indicate any preferential treatment towards Russia.

Regarding timelines for a possible ceasefire in Ukraine, there remains an ongoing uncertainty of the start of any ceasefire negotiations in the near-term. Therefore, any recent or future statements, by both the Ukrainian and Russian sides are likely continued attempts to establish and promote their respective negotiation positions prior to any actual negotiation process. It is therefore also likely that there will be varying degrees of intensity of attacks that might also target port infrastructure, as part of the positioning, by both sides.

Attacks on both Russian and Ukrainian infrastructure have continued during the past week, including reports highlighting the impact on Ukrainian energy infrastructure which continue to experience scheduled blackouts. Countrywide and locally scheduled brown- and blackouts should be expected. 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. The local impact on maritime operations, from Russian attacks, is likely to vary and some disruption cannot be ruled out, including possible impact on port operations.

Although there have been no recent incidents involving vessels, future attacks resulting in collateral damage, as part of attacks on Ukrainian ports remain possible, though targeted Russian attacks towards vessels is assessed as less likely. However, targeted vessel attacks cannot be ruled out entirely and the previous alleged Russian claims

of vessels transporting weapons to Ukraine and other similar tenuous reasons may be used in the future, as pretext for strikes on vessels, by Russia.

Russian offensive moves have continued along the front line with some Russian advances. It is still assessed that the current focus of the Russian military operations, is to try to conquer as much Ukrainian territory as possible and to weaken the Ukrainian society’s ability to deal with the winter weather.

Ukraine is also likely to continue to undertake attacks directed against Russia. In this case, targets are likely to be maritime and energy infrastructure, naval stations like the Novorossiysk Naval Base, or naval vessels – but unlikely to deliberately target commercial vessels.

The three scenarios below remain the most likely reasons for vessels being impacted by attacks. The order is arbitrary and does not indicate a ranking of the most likely scenario.

Scenario 1; vessels are targeted because the Russian military have, potentially faulty, intelligence regarding the vessel and their cargo, allegedly transporting military hardware and ammunition.

Scenario 2; attacks on port infrastructure and vessels are part of an attempt to deter vessels from using the Ukrainian transit corridor and cut-off Ukrainian maritime exports, by making it too uncertain and dangerous through the strikes on various vessels and vessel types.

Scenario 3: Russia considers it legitimate to target vessels in order to increase the pressure on Ukraine prior to any future negotiations.

Regardless of the Russian objectives, Ukrainian ports and their infrastructure remain likely targets by Russian forces. The previous apparent Russian disregard for or increased willingness to target cargo vessels and/or port infrastructure close to civilian vessels, also remain likely in future attacks. However, collateral damage to vessels in port and transiting the corridor remains the most likely possibility.

Ukrainian Black Sea Corridor

Vessels are understood to have transited the corridor to Ukrainian Black Sea ports.

Although Russian attacks are ongoing, there is nothing that points towards changes in the threat level, in relation to vessels transiting the Ukrainian Black Sea corridor – which therefore remains assessed as lower, compared to the threat from collateral damage to vessel in port. Incidents involving commercial vessels, either hit by collateral damage, due to general port attack, debris, missile misidentification, or potentially directly targeted, cannot be ruled out as part of future attacks.

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

Incoming drone, cruise-, and ballistic missile attacks against ports and other targets in Ukraine are known to cross the shipping corridor and while direct targeting of vessels is not expected to occur at sea, 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 some form of stable security situation is achieved. Such a situation should also 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.

Black Sea:

Reported war-related developments do not change the threat picture for the wider Black Sea - the north-western area is still considered an active war zone. 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.

Potential harassment, AIS/GPS signal jamming or spoofing or the use of warning shots or more extreme measures, cannot be completely ruled as a future occurrence.

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.

Although Russia has diminished much of its naval capabilities in the Black Sea and the Sea of Azov, it still maintains enough of a presence 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 threat 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.

There remains a continued threat of sea mines in the wider Black Sea. In relation to MCM operations, some reports note the complexity of the issue, an uncertain estimate of the overall number of mines, could be 1000 or more (possibly 50/50 placed by both Russia and Ukraine). Reports indicating near daily calls to national emergency services, in the countries bordering the Black Sea of possible mine-sightings highlight the underlining complexity. However, it must also be noted that not all calls turn out to be actual mines.

Frequent reports of the movement of UKR naval drones and special forces, and Russian aerial assets patrolling to counter these movements, continue to highlight the ongoing activity of such operations and flightpaths are known to also cross the area of the Ukrainian Black Sea corridor.

Conflict-related implications when operating in the Black Sea are likely to continue and have become more common since the Russian withdrawal from the UN-backed Black Sea Grain Initiative, in July 2023 – 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) remain controlled and operated by the Russian military and occupation authorities. While the Russians claim the ports to be open and being rebuilt – with claims of increased export figures – the actual operational status is unclear. Some vessels given access into these ports are reported 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 may be seen as legitimate military targets.

Some reports indicate that Russia has strengthened its defenses around the Crimea bridge as the bridge remains a coveted target by the Ukrainian military – underlined by previous strikes against the Kerch Strait Area.

Russia has previously 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:

Power-outages and air-raid alarms continue throughout the country, as a result of Russian attacks, which can also disrupt port operations. Concerns regarding the operational future of the country's energy network, including sufficient supplies and making the network more resilient to aerial attacks, continue to be expressed. Given the constant unpredictability, future disruption should be expected.

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, or indeed future negotiations it may be used by Russia as a pretext for future impact on Black Sea maritime

operations – and 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.

Ukraine is likely to continue to attempt strikes on Russian military targets Novorossiysk Naval base, naval vessels, as well as targeting energy infrastructure and port facilities related to energy exports. While Ukraine is unlikely to directly target civilian infrastructure or vessel traffic, but collateral damage in form of missile debris or similar is possible.

Overall, a Ukrainian attack against Russian maritime targets, predominately in Crimea, near Kerch and in the Eastern Black Sea remain a likely scenario – especially with regular capabilities like aerial drones.

Videos of naval and aerial drone attacks in Russian ports also highlights a general lack of advanced counter measures. 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:

As with previous weeks there have been developments along the frontline, however, although these indicate ongoing efforts by both Ukraine and Russia to position themselves as best as possible prior to any negotiations in 2025, they do not present any changes to the threat picture towards maritime operations in the northwestern Black Sea. Similarly, previous comments on possible timelines for ending the war, recent comments have been varied and do not indicate anything concrete – but do underline the ongoing uncertainty of when any real negotiations will take place. Several countries have proposed to host any future talks, but this too does not indicate anything concrete development.

Current circumstances are therefore likely to continue, and both parties will continue to be both bullish and bearish, given that both Russia and Ukraine are reportedly able to keep up the fight, at

present levels, as both are seemingly not able to escalate much beyond current levels of engagement. However, previous comments on negotiation positions, and earlier expressions by both Ukraine and Russia of possible redlines and aspects open to negotiation should still be seen as testing the waters to explore the other's position. That said, it cannot be ruled out that developments may occur quickly if both sides are presented with hardline ultimate negotiation positions – which may well be outlined by the US in order to attempt a quick conclusion – although recent comments by the US indicate they may be preparing a longer negotiation process to attempt a more sustainable solution to the war.

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 disrupt or discourage vessels transiting the Ukrainian Black Sea corridor are likely, including targeting Ukrainian port infrastructure, 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.

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 previously 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 reported “parcel-bombs” found at various DHL logistics sites, which have been attributed to Russian hybrid-operations, and 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, and local guidance.	Russian strikes do occur against targets in the Odesa Oblast, including some direct targeting of Odesa city and port facilities. The overall security situation remains highly unpredictable 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, and local guidance.	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 cannot be ruled out. The overall security situation remains highly unpredictable 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 do occur.		
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, and local guidance.	Russian strikes have occurred against targets in the Odessa Oblast. Future attacks targeting Chornomorsk port cannot be ruled out. The overall security situation remains highly unpredictable 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.	Incidents involving mines have previously occurred in the Black Sea near the canals. Russian strikes against the ports of Reni and Izmail, do occur. Local weather conditions, water levels, and pilot shortages also impact maritime operations. 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.		

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 local operational circumstances in the NW Black Sea.	The corridor is reported to be running without considerable issues, although disruption following attacks are to be expected. 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, collateral damage to vessels 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

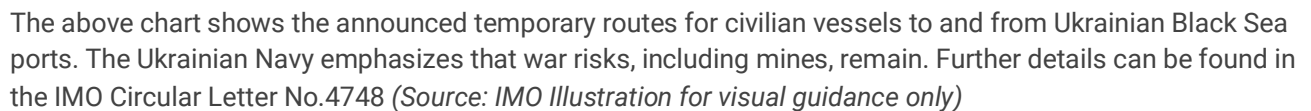


Risk Intelligence (Illustration for visual guidance only)

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 3:

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

