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Authors: George SCUTARU, CEO, New Strategy Center, former national security advisor to the President of Romania
RADM (ret.) Liviu COMAN, Senior associate expert, New Strategy Center, former Commander of the Romanian Maritime Component Command

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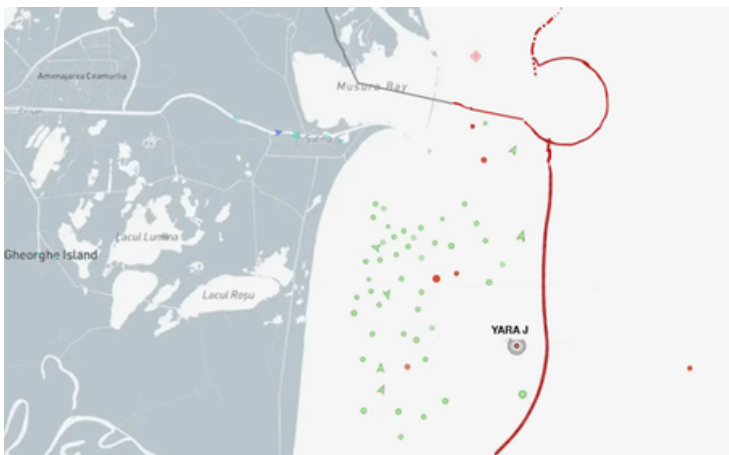
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Russia attacks a vessel in the territorial waters of a NATO member state for the first time

October marks a new stage in Russia's escalation in its war against Ukraine in the Black Sea. On 13 October, two commercial vessels were hit in Bulgaria's exclusive economic zone.¹ One of them, identified as the HS Dignity, flying the flag of Guinea-Bissau, sank, leaving 11 sailors missing at sea and prompting Sofia to summon the Russian ambassador.²

On the evening of 14 October, the Yara J, flying the flag of the Comoros Islands, was hit by a drone in Romania's territorial waters, near the port of Sulina, approximately 8-10 nautical miles southeast of the town's breakwater.³



Source: Marine Traffic, <https://www.marinetraffic.com/> & edited by New Strategy Center

Sulina is a strategic Romanian port on the Black Sea, serving as a gateway to the Danube via the Sulina Canal. Most of the traffic between Ukraine's and Romania's Danube ports and the Black Sea passes through this canal. The alternative route is the Danube-Black Sea Canal, which leads to the port of Constanța, although this route is longer. In 2022-2023, during the first naval blockade imposed by Russia on Ukraine's Black Sea ports, Romania modernised the navigation system on the Sulina Canal, enabling vessels to transit at night as well.⁴

From August 2026 until the day of the attack, between 70 and 110 vessels were anchored daily in the Sulina roadstead, while between 55 and 80 vessels were either navigating in or out of the Sulina-Galați fairway or remaining at anchor.⁵ The high density of vessels increases the risk of drone attacks or explosions caused by drifting mines. At the same time, it complicates protective measures, including electronic jamming against drones and the use of various kinetic, aerial or naval capabilities.

The Yara J reported the incident by radiotelephone to the Sulina Harbour Master's Office.⁶ Following the explosion, a fire broke out on board, and the crew was evacuated by Romanian rescue teams. "At 20:04, two aerial targets entered the national airspace. Subsequently, radar contact with one of the targets was lost over the sea, while the other left the national airspace at 20:13, heading towards Vylkove, Ukraine. The target proceeded towards Reni, Ukraine, on a trajectory potentially leading to the city of Galați, prompting the issuance of a new RO-ALERT message for eastern Galați County at 20:33. The target was destroyed by Ukrainian air defence in the vicinity of Reni, north of the Chilia branch of the Danube. The air raid alert ended at 21:14," stated Romania's Ministry of National Defence in a communiqué issued on the evening of 14 October.⁷ This communiqué suggests that the target whose radar contact was "lost over the sea" may have been the one that struck the Yara J.

On the morning of 15 October, another vessel was hit, this time in Romania's exclusive economic zone, close to the limit of its territorial waters. "At around 07:00, the commercial vessel Wine Trader, flying the flag of San Marino, issued a distress alert reporting a fire in

the vessel's superstructure," representatives of the Romanian Naval Authority stated.⁸ Of the 12 sailors on board, only five were rescued, while seven remained missing. As of 19 October, the date of publication of this report, they had not been found by the

Romanian authorities involved in the search and rescue operations.⁹ It should be noted that stormy sea conditions, with sea state four, prevailed on the days when these incidents occurred, making the rescue teams' intervention considerably more difficult.¹⁰



Source: Romanian Ministry of Internal Affairs

Russia's escalation, culminating in an attack on a vessel in a NATO member state's territorial waters, follows several incidents in Romania's exclusive economic zone. Russian pressure on Romania has been evident since July, when attacks on vessels in Romania's exclusive economic zone began, apparently aimed at disrupting the movement of ships carrying grain from Ukraine or transporting various goods to Ukraine. On 21 July, the Gas

Lisbon was hit¹¹, followed by the Christiana B on 24 July¹² and the Progres IV on 27 August.¹³

However, Russia's maritime escalation had already reached a peak on 5 June, when a Ukrainian drone entered the port of Constanța and self-destructed several hours later. Romanian authorities had been warned by their Ukrainian counterparts that they had lost control of the drone and that it was equipped with a self-destruct mechanism.



Source: Facebook page,
<https://www.facebook.com/robert.duca.1/videos/2902598423410745/?t=2>

Source: amateur - <https://stirileprotv.ro/stiri/international/ce-i-a-cerut-romania-ucrainei-dupa-drona-maritima-care-a-explodat-in-portul-constanta.html>

Nearby, 900 tonnes of ammonium nitrate were stored.¹⁵ Had the drone exploded in that location, Romania's largest Black Sea port could have suffered major damage. This incident was the first Russian false-flag operation. The drone's control was taken over by Russian forces, demonstrating Russia's advanced electronic warfare capabilities, which could be employed in a similar manner on other occasions.¹⁶

On 24, 25 and 26 July, the Romanian Air Force successively shot down Russian Geran-2 drones. Another particularly serious incident occurred on 29 May, when a Russian Geran-2 drone struck a residential apartment building in the city of Galați, injuring two Romanian citizens.

This sequence of events shows that Russia has been pursuing an increasingly escalatory course in the Black Sea for at least four months, while NATO's response has been too restrained, allowing Russia to become even more aggressive. The lack of action by NATO turns deterrence into a failure. Russia will not interpret such a concessionary approach as a gesture of goodwill, but rather as evidence of weakness and a lack of political will, encouraging Moscow to continue its escalation. Russia's attack on a vessel in Romania's territorial waters is a consequence of the failure to act firmly when Russia repeatedly attacked commercial vessels in Romania's exclusive economic zone.

The context in which this Russian attack took place deserves particular attention. On 9 October, President Trump announced the "diesel deal" between the United States and Russia, which took both European allies and Ukrainians by surprise.¹⁷ A few days later, Trump publicly advocated for Zelenskyy to be replaced.¹⁸

All these concessions encourage Putin to become even more aggressive towards both Ukraine and European NATO member states, reinforcing his perception that the United States will not intervene.

On 12 October, General Alexus Grynkewich, NATO's Supreme Allied Commander Europe (SACEUR), presented his Theory of Victory at the Warsaw Security Forum, outlining how NATO would repel an attack against the Alliance. The initiative was intended both for citizens of countries under NATO's security umbrella and for Russia, to demonstrate the North Atlantic Alliance's determination to defend itself. "I'll share with you how we do this – what I call my Theory of Victory. The theory posits the conduct of a denial defence, an approach tightly aligned with the Alliance's strategy, what we call Deterrence and Defence of the Euro-Atlantic area, or DDA," General Grynkewich stated.¹⁹

Russia's response came in less than 48 hours, with an attack on a neutral vessel in the territorial waters of a NATO member state. In a sign of the seriousness of the situation, on 15 October, Romanian President Nicușor Dan and Bulgarian Prime Minister Rumen Radev requested a meeting with NATO Secretary General Mark Rutte. Beyond Rutte's statement following the meeting that "NATO will continue

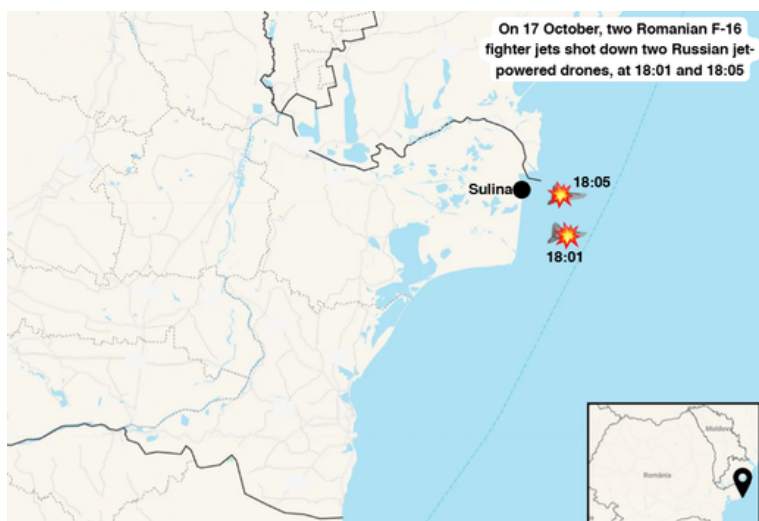
to work closely with our Black Sea Allies, adapting our deterrence and defence posture whenever and wherever necessary,”²⁰ no announcement has yet been made regarding the immediate deployment of additional allied capabilities to Romania and Bulgaria.

At the request of the two NATO member states, the North Atlantic Council (NAC) will meet on 20 October to discuss the security situation in the Black Sea. This is not the first time in the past three months that NATO has addressed developments in the region. On 10 June, a special NAC meeting was held at Romania’s request, following the incidents in Galați on 29 May and at the Port of Constanța on 5 June. Following that meeting, Romania’s Ministry of Foreign Affairs stated that “Romania highlighted the urgent need to strengthen allied capabilities deployed on national territory, particularly in the areas of air defence and counter-drone capabilities.”²¹ Nevertheless, these capability shortfalls persist to this day.

Following the meeting with Mark Rutte on 15 October, Romanian President Nicușor Dan presented the particularly serious security situation in the Black Sea at the European

Council meeting in Brussels the following day. He called on European allies to provide support to help bridge Romania’s capability gap until the equipment procured under the SAFE programme arrives.²² So far, only France has expressed concrete support, with French and Romanian military officials expected to discuss the technical aspects in the coming period.²³

Romania is now demonstrating its determination to act, but it needs support from its NATO allies. On the evening of 17 October, two Romanian Air Force F-16 aircraft were scrambled after radar systems detected a group of aerial targets approximately 120 km east of Snake Island, moving in a southwesterly direction. The first drone was shot down over Romania’s territorial waters, within the country’s national airspace, at 18:01, southeast of Sulina, after remaining in Romanian airspace for two minutes. The second was shot down at 18:05, east of Sulina, after spending five minutes in Romanian airspace. Romania’s Ministry of National Defence reported that the neutralised targets were jet-powered attack drones belonging to the Geran family.²⁴



Source: Snazzy Maps, edited by New Strategy Center



Source: Romanian Ministry of Defence

Romania is facing a shortfall in ISR (Intelligence, Surveillance and Reconnaissance) capabilities and in capabilities to engage and neutralise drones. The density of these capabilities is a concern both at sea and on land. For example, Romania needs to defend the urban area of Galați, located just 10 km from the Ukrainian border and 12 km from the Ukrainian port of Reni. The reaction time available when dealing with a Geran-4 or Geran-5 drone powered by a jet engine is no more than 30 seconds, which is wholly insufficient.²⁵

Romania must also prevent the blocking of the Sulina Channel, the most important commercial artery on the Danube, with navigation taking place both day and night, including by larger vessels capable of operating on the Black Sea. The channel played a critical role during 2022-2023, when Ukraine redirected much of its exports through the Danube, using its ports of Reni and Izmail together with the Romanian port infrastructure at Galați and Brăila, and transferring grain shipments to global markets through the Romanian ports of Constanța and Sulina. Now, the Sulina Channel plays the same vital role in sustaining Ukrainian exports. One possible method by which Russia could disrupt navigation on the Danube would be through sabotage in the Sulina Channel. A maritime drone could attempt to enter the channel and strike a moving commercial vessel. The resulting explosion and the sinking of the vessel could obstruct the channel, effectively blocking commercial traffic. Such an incident would directly affect Romania's commercial interests as well as Ukraine's, particularly given that Ukraine's seaports remain severely constrained and the Danube, together with the Sulina Channel, constitutes one of the country's key alternative export routes. Russia has already demonstrated

its ability to operate drones on the Danube. A relevant example occurred on 28 August 2025, when a Russian naval drone struck the Ukrainian vessel Simferopol. The attack took place about 25 km from the Danube mouths and just 4 km upstream from the Romanian village of Periprava, only 100 meters to our riverine borders with Ukraine.²⁶

NATO must change its approach in the Black Sea

Transfer ISR and counter-drone capabilities to Romania to increase the density of available assets

Russia's continued aggressive behaviour and the escalation of its actions should convince us that it is time to change our approach. Beyond public statements and STRATCOM campaigns, we need firm decisions, because Russia and Putin respect only the language of force. Such a transfer of capabilities would help Romania more effectively detect and destroy Russian drones that violate its airspace or threaten critical energy infrastructure in Romania's exclusive economic zone. This is particularly important for Romania, as its most significant energy project, the development of the Neptun Deep offshore natural gas field in the Black Sea, is currently in the final stages of construction. In 2027, Romania is expected to become the European Union's largest natural gas producer, with a significant impact on regional energy security by contributing to the diversification of supply sources for several countries.

A NATO maritime mission to protect freedom of navigation and critical infrastructure in the Western Black Sea basin

Until now, the security situation in the Black Sea has appeared manageable, albeit with difficulty, by the three NATO member states bordering it: Türkiye, Romania and Bulgaria. At Türkiye's initiative, the Black Sea Mine Countermeasures Task Group (TG MCM Black Sea) was established in 2024 as a trilateral initiative aimed at countering mines in the Black Sea.²⁷ At the NATO Summit in Ankara in July 2026, the task group's mission was extended to include the protection of critical underwater infrastructure, including pipelines and submarine cables.²⁸ TG MCM Black Sea is an important instrument for regional cooperation in mine countermeasures, but it cannot replace a permanent national capability for monitoring and protecting maritime traffic. Minehunters and minesweepers are specialised platforms with relatively limited size and endurance, as well as limited capabilities to detect and engage aerial targets, particularly drones. These limitations stem from their mission and configuration, not from the performance of their crews. Joint maritime activities under TG MCM Black Sea take place during exercises and periods of activation, totalling approximately 30-40 days per year. During the remainder of the year, ensuring a continuous presence, surveillance and protection in areas of maritime interest remains primarily the responsibility of national authorities and forces, within their respective mandates and in the framework of Allied cooperation.

Although many of the vessels attacked in the Black Sea are owned by Turkish companies, Türkiye's silence in recent days is noteworthy.

Türkiye has previously condemned attacks on Turkish vessels in the Black Sea that undermine its economic interests. Now, no senior Turkish official has joined Romania and Bulgaria in their efforts within NATO, and North Atlantic Council meetings are not a stage in which Türkiye appears willing to facilitate the presence of other NATO member states in the Black Sea. Faithful to its policy of regional ownership, Türkiye seems more concerned with keeping the management of security incidents within the remit of the littoral states than with encouraging initiatives that would bring other actors into the Black Sea.²⁹

Given the deteriorating security environment in the Black Sea, the growing threat posed by unmanned aerial and maritime systems, and the strategic importance of offshore energy infrastructure, NATO should launch a multinational maritime activity dedicated to protecting freedom of navigation and critical infrastructure in the western Black Sea basin, modelled on Baltic Sentry. It should operate under the authority of the appropriate NATO command structure, with MARCOM playing a central role. The main benefit would be to integrate surveillance and response capabilities within a NATO framework. NATO launched Baltic Sentry on 14 January 2025 to protect critical underwater infrastructure, deploying frigates, maritime patrol aircraft, unmanned systems and multinational surveillance assets. Baltic Sentry is a multi-domain activity led by JFC Brunssum, with MARCOM playing a central role in the maritime component, under the overall authority of SACEUR.³⁰

This initiative could include operational areas of responsibility within the territorial sea, the contiguous zone and the exclusive economic zone, while respecting the specific legal regime applicable to each maritime area, the United

Nations Convention on the Law of the Sea (UNCLOS) and the Montreux Convention.

Conducting activities under a NATO mandate, based on approved rules of engagement and integrated command-and-control mechanisms, would facilitate the coordination of Allied naval, air and surveillance assets, as well as cooperation with civilian maritime authorities. It would also enable a common approach to threats against energy infrastructure and navigational safety, without replacing the powers and responsibilities of the littoral states. Such an initiative would mark a shift from a predominantly national approach to protecting freedom of navigation and critical maritime infrastructure towards an Allied mechanism for surveillance, deterrence and coordinated response. It would contribute to strengthening NATO's eastern flank and protecting the strategic interests of the Allies, including those of Romania, Bulgaria and Türkiye in the Black Sea.

The security situation in the Black Sea is already putting Romania and Bulgaria at risk, making Türkiye's continued closure of the Straits increasingly counterproductive. NATO, together with Türkiye, Romania and Bulgaria, must commit to a firm response to halt Russia's escalation.

A No-Fly Zone over Ukraine's Danube Ports

If Russia continues to attack vessels operating in Romania's territorial waters and in the contiguous zones and exclusive economic zones of Romania and Bulgaria, NATO should initiate efforts to establish a no-fly zone to protect the Ukrainian Danube ports of Reni, Izmail, Kiliia and Vylkove. This measure would be strictly defensive in nature and would protect trade along the Danube. It could be implemented through bilateral legal arrangements with Ukraine, particularly to clarify the applicable rules of engagement.

NATO must first and foremost demonstrate greater resolve and a stronger willingness to send a clear signal to Russia that its escalation in the Black Sea must stop. Otherwise, Russia will continue to exert pressure on NATO, particularly on Romania, seeking to determine how far it can push this pressure and, consequently, intensify its escalation.

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