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Published in:
Eurasia Review

Published: 18/01/2025

Document Version
Final published version

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[Link to publication](#)

Please cite the original version:

Gözübenli, A. S. (2025). The Shadow Fleet: Navigating The Nexus Of Ecological Peril And Geopolitical Strife. *Eurasia Review*. <https://www.eurasiareview.com/18012025-the-shadow-fleet-navigating-the-nexus-of-ecological-peril-and-geopolitical-strife-analysis/>

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The Shadow Fleet: Navigating The Nexus Of Ecological Peril And Geopolitical Strife – Analysis

By A. Sencer Gözübenli

This is the full version of an article originally published in the Eurasia Review. For the published version, please refer to eurasiareview.com

In the labyrinthine world of global shipping, a silent menace operates in the shadows, one that threatens ecological balance, undermines international law, and fuels geopolitical tensions. This "[shadow fleet](#)," an unofficial armada of outdated and opaque oil tankers, primarily serves Russia, as well as Iran, North Korea, and Venezuela, circumventing sanctions and safety standards. Yet its unchecked operations represent more than a threat to economic integrity; they are a ticking ecological and geopolitical catastrophe.

A [recent incident](#) near the German coast starkly illustrates these dangers. In January 2025, the Eventin, a 274-meter-long tanker carrying approximately 99,000 tonnes of Russian oil, lost power and steering in the Baltic Sea near the island of Rügen. German maritime authorities deployed tugboats to secure the vessel, narrowly averting an environmental disaster in one of Europe's most sensitive marine ecosystems. This near-catastrophe, which required urgent action to stabilize the aging tanker, underscores the profound risks posed by the shadow fleet's growing reliance on outdated and unregulated vessels.

The Baltic Sea, where [around 50% of shadow fleet oil exports pass through](#), already classified as a "[Particularly Sensitive Sea Area](#)" by the International Maritime Organization (IMO), is uniquely vulnerable. Its semi-enclosed geography limits water exchange, compounding the environmental and economic consequences of pollution. In the event of an oil spill, the impact would be catastrophic, destroying marine habitats and crippling local economies reliant on fisheries and tourism. This risk is not theoretical: an accident in this region could destroy fragile marine ecosystems, paralyze regional economies, and create lasting geopolitical friction. The Eventin incident brings into sharp relief the [reckless operational standards](#) of the shadow fleet, where vessels are often over 20 years old, inadequately maintained, and obscured by opaque ownership structures. The lack of proper maintenance and credible insurance magnifies their risk profile. Should a disaster occur, determining accountability would be nearly impossible, leaving affected ecosystems and communities to bear the consequences.

Historical precedents amplify these concerns. The [Prestige oil spill](#) off the coast of Spain in 2002, caused by a 26-year-old structurally compromised tanker, resulted in over 60,000 tonnes of oil being discharged into the Atlantic Ocean. The disaster devastated marine ecosystems, disrupted livelihoods, and cost billions in cleanup efforts. However, while the Prestige tragedy involved a vessel operating within the framework of international law, the shadow fleet operates in a legal and regulatory void, making accountability and enforcement nearly impossible.

A more recent incident underscores the growing risks of this unchecked system. In May 2023, the Pablo, a 1997-built uninsured tanker operating under a Gabonese flag, [exploded](#) off the coast of Malaysia, in one of the busiest shipping channels in the world, after unloading its cargo in China. Thanks to its nearly empty state, a catastrophic spill was narrowly avoided, but the explosion resulted in several fatalities and released toxic fumes into the atmosphere. [Pablo's obscure ownership](#) and poor maintenance mirrored the systemic failings of the shadow fleet, highlighting the convergence of environmental, human, and operational risks associated with these vessels. But the shadow fleet is already signaling a global environmental crisis in slow motion. According to analysts, the shadow fleet [spills over 4.5 million barrels of oil](#) annually (equivalent to a medium-scale oil spill every month) due to substandard maintenance and unregulated operations, significantly degrading the marine environment worldwide.

The shadow fleet's danger is not confined to oil spills alone but a [suspected instrument of the Russian hybrid warfare](#) targeting critical infrastructure in the Baltic and beyond. Recent investigations have revealed that some shadow fleet vessels are linked to sabotage and undersea infrastructure damage. Finnish authorities [detained the crew of the Eagle S](#) in connection with damage to the [Estlink-2 undersea cable](#) between Finland and Estonia in late 2024. Similarly, the [Baltic Connector gas pipeline rupture](#) in October 2023 was to have involved a Russian-affiliated Chinese vessel. These incidents expose the shadow fleet's capacity to heighten geopolitical tensions in already volatile regions.

One of the shadow fleet's most concerning practices is the routine deactivation of [Automatic Identification Systems \(AIS\)](#). This maneuver renders vessels invisible to tracking systems, facilitating sanctions evasion and increasing collision risks in congested shipping lanes. The deliberate concealment of these ships' movements endangers not only other vessels but also regional security. From the start of the Russian invasion of Ukraine in February 2022 to April 2024, analysts at Vortexa and Windward documented over [1,300 such "dark vessels" as well as over 1,000 flag-hopping "gray vessels"](#) in critical maritime corridors such as the Strait of Hormuz, the English Channel, and the Danish Straits with their top three destinations of India (+1.8M Barrels per Day), China (+1.5M Barrels per Day), and Turkey (+670K Barrels per Day) since March 2023. And the fleet kept [growing rapidly](#).

Despite the [IMO's 2023 resolution](#) urging member states to crack down on fraudulent ship registrations and enhance inspections, enforcement remains inconsistent. Given the IMO's limited enforcement powers, especially the European Union (EU), should take a more active role in implementing stringent monitoring and enforcement protocols. Germany's swift response to the Eventin incident demonstrates how local leadership can mitigate risks in high-stakes situations, but such responses must be scaled to address the systemic nature of the shadow fleet threat.

Germany's swift response to the Eventin incident exemplifies the proactive role coastal nations can play in mitigating risks. However, stronger international cooperation and alignment of enforcement strategies are urgently needed. Many observers have long pointed out that [Denmark](#), with its strategic position overseeing the maritime chokepoint between the North and Baltic Seas, has the potential to play a leading role in tightening controls. Enhanced inspections,

greater regional coordination with Baltic Sea stakeholders, and the establishment of joint enforcement mechanisms could significantly curb the shadow fleet's operations.

The geopolitical ramifications are equally stark. The shadow fleet enables sanctioned nations to sustain oil exports, undermining international efforts to curb malign activities. Russia, for example, uses these ships to bypass the [G7-imposed \\$60-per-barrel price cap](#), generating billions in oil revenue to sustain its aggression in Ukraine. Similarly, Iran has relied on the shadow fleet to ship oil to China, circumventing U.S. sanctions and funding regional proxy conflicts. This undermines the unity of sanctions regimes and creates economic distortions, as law-abiding companies face unfair competition from unscrupulous operators. The result is a parallel system of unregulated oil trade that diverts global oil trade into opaque channels that fuel corruption and destabilization, further eroding the rule of law and destabilizing global markets.

Tackling this issue requires a multifaceted approach. First, international organizations with enforcement and regulatory capabilities, such as the EU, must take the lead in implementing stringent monitoring protocols, supported by the IMO in enhancing governance frameworks and technical standards. This includes mandating full transparency in vessel ownership, insurance coverage, and operational compliance. Ships operating without credible insurance or registered under opaque 'flags of convenience' must face immediate interdiction. Regional coalitions like the Association of Southeast Asian Nations (ASEAN) can play a vital role by fostering collaboration among member states to enhance monitoring and coordination in the region's critical maritime corridors.

Second, technological solutions, such as [satellite-based vessel monitoring systems](#) or AI-driven solutions like [Nordic Warden](#), should be deployed to track and intercept tankers engaging in AIS deactivation. Governments must also invest in robust inspection regimes at ports and establish regional coalitions to coordinate responses to shadow fleet activities.

Third, and most critically, the ecological risks posed by these vessels demand immediate attention. The Baltic Sea, the Mediterranean, and other vulnerable marine environments are ill-equipped to handle the scale of disaster that could result from a shadow fleet spill. The Eventin incident serves as a stark warning: the world is unprepared for the environmental and economic fallout of such a crisis. To mitigate these risks, nations must establish rapid-response frameworks and enhance capacity for dealing with large-scale spills, drawing on lessons from past disasters like Prestige and Pablo.

The shadow fleet is not merely a logistical workaround for sanctioned regimes; it is a symptom of systemic failures in global governance and environmental stewardship. Its unchecked proliferation represents a breakdown in international cooperation, as well as an urgent test of the global community's ability to balance sustainability with security. Addressing its risks requires a paradigm shift in how the international community integrates environmental stewardship with collective geopolitical strategy.

As the world grapples with the dual challenges of ecological crises and geopolitical instability, the shadow fleet reminds us that sustainability and security are inseparable. Strong leadership is essential; nations and international organizations must prioritize long-term stability over short-term economic interests. The specter of an ecological calamity is no longer a question of "if," but "when." The time for decisive action is now before the next disaster forces us to confront the cost of inaction.