



Transnistria, in the shadow of the war in Ukraine

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#Transnistria
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Two years of war in Ukraine have accentuated economic dependence and social vulnerabilities in Transnistria. The Moldovan separatist region is at risk of collapse as the prospect of its reintegration into Chisinau is revived.

On 28 February 2024, just a few days after the second anniversary of the start of the war in Ukraine, the President of Transnistria, Vadim Krasnoselski, convened a congress bringing together the political elite of this breakaway region of Moldova. This Transnistrian initiative, which called for Russian protection (with over 200,000 of its inhabitants reportedly holding Russian passports), similar to pre-war situations in Georgia and Ukraine, raised concerns among international observers about the immediate extension of the Ukrainian conflict to

this territory bordering southern Ukraine. However, the widespread fear reported by international media contrasted sharply with the local calm regarding the risk of opening a new front. Over the last two years, Moldova and, within it, Transnistria have witnessed significant transformations that have shaped its political, economic and social dynamics, no doubt explaining the gap in perceptions. Despite appearances, the current danger for Transnistria in the short term is probably less military *stricto sensu* than socio-economic, and therefore **less the risk of escalation than of collapse.**

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This paper aims to analyse these developments and assess their implications for Transnistria and the prospects for resolving the Transnistrian conflict¹. It begins by examining the strategic front of the war in Ukraine, highlighting the contradictions and complexities of the interactions between Transnistria, which is striving for survival, and the conflict raging on its borders. Next, it explores the shift in the security status of the separatist region from military risk to socio-economic vulnerability, analyzing how the war has threatened the stability of this separatist entity. Finally, it considers the present prospects, between European integration and the reintegration of Transnistria into Moldova, to understand possible future directions for the region.

I • A hotbed of tension in south-west Ukraine

Transnistria is a separatist entity covering 4,163 km² in the east of Moldova, representing 11% of its territory, located between the Dniester River and south-west Ukraine. The capital, Tiraspol, is just about a hundred kilometers from Odessa, a major Black Sea port that it serves as a hinterland. Currently, Ukraine, which is defending a front of almost 1,000 km against Russia, places particular importance to the reintegration of Transnistria into Moldova and, to a lesser extent, developments in Gagauzia. **Tiraspol's independence is seen by Kiev as a threat to its own security.** This focus could have visible implications for relations between the various parties concerned, on security, diplomatic and socio-economic levels.

In fact, it should be noted that Transnistria does not constitute a military front as such, since it is not a theatre of operations, despite some visible externalities of the conflict.² Despite sharing a long border with Ukraine and hosting Russia's 14th Army, **neither its administration, its economic elites nor its population have any desire to join Russia in the war in Ukraine.** In February 2022, no Transnistrian soldiers had crossed into Ukrainian territory, likely due to a lack of capacity to lead an offensive and defend the region. Conversely, the idea of Ukrainian military intervention in Transnistria against Russian troops has occasionally surfaced in Kiev. However, Moldovan authorities remain firmly opposed to such actions due to the risks involved. As recently as mid-April 2024, Ukrainian MP Oleksiy Goncharenko raised this issue at the Parliamentary Assembly of the Council of Europe, but Moldovan Foreign Minister Mihai Popsoi rejected the proposal, advocating for a peaceful resolution to the conflict.³ Generally, Moldova, whose neutrality has been enshrined in its constitution since 1994, does not support a military solution to the Transnistrian issue. In the current context, pursuing such a path would expose the country to the risk of Russian reprisals, unprecedented since the end of the Transnistrian war.⁴ Due to the ongoing war, Moscow's attempts to destabilize Moldova's legitimate government, and Moldova's application to join the European Union, relations between Moscow and Chisinau have significantly deteriorated. This is evident in the national security strategy adopted in December 2023, which explicitly identifies Russia as an adversary.⁵

1 The Transnistrian War, also referred to as the Russo-Moldovan War, erupted on November 2, 1990, in Dubăsari, pitching pro-Transnistrian forces, backed by the 14th Russian army, against pro-Moldovan forces. Stretching from spring to summer 1992, the conflict, punctuated by temporary truces, unfolded amid heightened political and ethnic tensions. Nationalist aspirations, linguistic disparities, and political divisions fueled the conflict, prompting Transnistria to declare independence from the Republic of Moldova, fearing cultural assimilation and annexation by Romania.

2 On several occasions, Transnistria has been the object of various accidents or attacks, depending on how you interpret them. In April 2022, the Transnistrian security services were attacked and two transmitting antennas near the town of Măiaș exploded. Recently, in early April 2024, a drone strike near Ribnita was also the subject of speculation and tension between representatives of the two banks of the Dniestr.

3 <https://point.md/ru/novosti/politika/goncharenko-and-34-ne-pora-li-reshit-pridnestrovskii-vopros-liubymi-sredstvami-and-34/>

4 A ceasefire was signed in July 1992.

5 "It is clear that the Russian Federation will not give up its hostile actions any time soon. We will therefore have to learn to live in the conditions of a long-term, high-intensity hybrid war. The Republic of Moldova must constantly develop and strengthen its immunity against hybrid threats" https://presedinte.md/app/webroot/uploaded/Proiect%20SSN_2023.pdf

On the diplomatic front, despite three decades of independence, a comprehensive and lasting solution to the Transnistrian conflict has remained elusive. In the aftermath of the conflict, a specific negotiation framework was established with the goal of restoring Moldova's territorial integrity and granting Transnistria a special status. This framework brought together five key players under the auspices of the OSCE, including the OSCE itself, Russia, Ukraine, Moldova, and Transnistria. The OSCE's mandate also aimed at the withdrawal of foreign (namely Russian) troops, ensuring compliance with international obligations regarding human and minority rights, and facilitating the monitoring of agreements for a sustainable political settlement. Over time, this format evolved into the "5+2" format in 2003, incorporating the United States and the European Union as observers. However, it's important to note that this mechanism has become stalled, with the last effective meeting occurring in October 2019. As a result, exchanges now often occur in a "1+1" format, directly involving Moldova and Transnistria. In this context, **since Moldova's independence, Russia's policy has been aimed at leveraging Transnistria to influence Moldova's overall geopolitical direction, rather than recognizing Transnistria's independence**, which would leave it landlocked between potentially hostile states. Despite requests from Tiraspol, no UN member state, including Russia, has recognized Transnistria's independence.

Moreover, economic relations between Transnistria and the rest of Moldova have recently been strained. Historically, the breakaway region boasted greater industrial potential, particularly in sectors such as steel, energy, and agri-food, compared to the more rural and agricultural areas of the rest of Moldova. With prominent industrial exporters centered around the MMZ metallurgical plant in Ribnita and the Cuciurgan power station, Transnistria's local economic

system operates independently, featuring its own currency, the Transnistrian rouble, and central bank. However, the Transnistrian economy has experienced **significant decline in recent years, marked by depopulation—more pronounced than in the rest of Moldova**—with approximately 340,000 inhabitants today, nearly half the population in 1991, and an aging demographic, including around 100,000 pensioners. Since the onset of the war, Ukrainian authorities closed all border crossings, disrupting key supply routes to Transnistria, particularly railways. It wasn't until October 17, 2023, that a train traversed Transnistrian territory again, solely in transit between Ukraine and Moldova. This exacerbated the economic isolation of the region⁶, characterized by high trade openness and **increasing dependency on the EU economy for exports** (76% in 2022).⁷ Against this backdrop, in August 2023, Moldovan authorities mandated Transnistrian companies to pay a fee for customs procedures starting January 1, 2024, much to the chagrin of Transnistrian leadership.⁸ Consequently, **Transnistria now relies increasingly on Moldovan government approval for exports to the region**, particularly for dual-use goods, which pose significant security concerns. Following suit with other companies, Moldovan customs authorities classified electric motors produced by the Elektromash factory in Tiraspol under this category in April 2024⁹, sparking outrage among separatists who perceive it as a blockade.

While the longstanding Transnistrian conflict had achieved a semblance of stability over time, the war in Ukraine has thrust Transnistria into a period of significant upheaval, especially on the economic front. In addition to these external factors, it's important to note that the Transnistrian issue is also undergoing changes based on its internal dynamics.

6 Thomas Merle, «La Transnistrie, la mondialisation paradoxale d'un État non reconnu», *L'Espace Politique*, 43, 2021-01, online 01 March 2022. <https://journals.openedition.org/espacepolitique/9559#quotation>

7 <https://novostipmr.com/ru/news/23-01-17/pridnestrovskiy-eksport-v-2022-godu-sokratilsya-na-200-millionov>

8 Kamil Calus, "Transnistria in the new international reality", *OSW Commentary*, 23 December 2023. https://www.osw.waw.pl/en/publikacje/osw-commentary/2023-12-29/transnistria-new-international-reality#_ftnref3

9 <https://novostipmr.com/en/news/24-04-01/due-actions-moldovan-authorities-elektromash-plant-tiraspol-going>

II • The metamorphosis of the Transnistrian question

For quite some time, the military situation has been the primary source of concern in Transnistria, both in terms of personnel and equipment. Regarding military personnel, the issue of the evacuation of the 14th Army, which transformed into the Operational Group of Russian Forces (OGRF) in 1995, has been a contentious issue between Russia and Moldova, with the current Moldovan authorities pressing for their immediate departure. These forces supporting the *de facto* Transnistrian state consist of around 2,500 men, along with paramilitary forces totaling 7,000 men, comprising armed forces, units from various ministries, the customs service, and the Black Sea Cossacks¹⁰, in addition to reservists. Furthermore, the substantial ammunition depot at Colbasna, housing approximately 22,000 tons of armaments, poses an increased risk of accidental explosions due to its uncertain state of preservation, potentially leading to casualties, material damage, and heightened tensions between the parties involved. Despite these concerns, **Transnistria possesses relatively limited resources in terms of personnel and weapons** and relies on Romania for its fuel supplies.¹¹ However, these worries have expanded to encompass growing economic and social challenges that threaten its stability.

In terms of energy, Transnistria faces significant hurdles in both gas transit and electricity production. **Gas deliveries from Russia, transiting through Ukrainian territory, have become a source of uncertainty**, especially as the gas transit contract with Ukraine is set to expire by January 1, 2025.

With an annual gas consumption of approximately 5 billion cubic meters, Transnistria's energy dependence is worrisome, as a portion of its production relies on subsidized energy from Russia. Additionally, the major Cuciurgan power station, owned by the Russian company Inter RAO, depends on these gas supplies for its operation, further heightening the risks associated with any interruptions in deliveries. Some of the power station's facilities, commissioned in the 1960s, are beginning to be considered obsolete, necessitating significant investments for modernization. Furthermore, Moldova's reduced dependence on this power station, owing to a major electricity interconnection project with Romania, will ensure a more secure and diversified supply, thus lessening Chisinau's reliance on Transnistria, where most of its electricity originated before the war.

Politically, Transnistria has functioned as a *de facto* state since its independence, possessing its own territory, population, and administrative system, albeit without international recognition. **Internal governance is characterized by a form of authoritarianism**, with limited political pluralism and restricted press freedom, dominated by a single party. For years, Sheriff¹² maintained political and economic hegemony, but the changing circumstances now require a re-evaluation of its relations with Chisinau to retain at least some sources of income. The political elite has shown little inclination to implement meaningful democratic reforms, maintaining strict control over political processes.¹³ However, **there are discrepancies between the interests of economic elites, who look towards European markets, and political elites who remain closely tied to**

¹⁰ "Actual Military Arsenal of the Tiraspol Regime", *Watchdog*, March 2024.

¹¹ Transnistria is believed to possess approximately 18 T-64 BV tanks, which is less than the standard complement for a tank battalion, typically ranging from 30 to 40 tanks. Additionally, their arsenal includes armored carriers, mine-layers, various armored combat vehicles, several dozen Grad rocket launchers, Konkurs (AT-5 Spandrel) self-propelled anti-tank missile systems, 100mm and 85mm towed guns, 6 2S1 Gvozdika self-propelled howitzers, 42 conventional 120mm guns, and four Mi-24 attack helicopters, alongside conventional Mi-8 transport helicopters. However, the operational readiness of this equipment remains uncertain due to maintenance issues and the lack of spare parts, which were previously supplied via Ukraine.

¹² Sheriff, helmed by Transnistrian oligarchs Viktor Gushan and Ilya Kazmaly, holds sway over the majority of lucrative sectors in the local economy. Moreover, it wields significant influence in regional politics, with as many as 29 out of 33 'deputies' and President Krasnoselski aligned with the *Obnovlenie* (Renewal) party, which receives financial backing from the company to champion its interests.

¹³ The assassination of Oleg Khorzhan, a prominent opposition figure and leader of the Transnistrian Communist Party, in July 2023 underscores this point. <https://www.opendemocracy.net/en/odr/transnistria-russia-ukraine-oleg-khorzhan-murder/>

the security services, whose survival relies on Moscow's support.

The evolving dynamics surrounding the Transnistrian issue raise concerns about the potential for a swift decline in the region's socio-economic conditions, which could precipitate heightened poverty, widespread migration, and socio-political unrest across Moldova. Amidst this atmosphere of uncertainty, the significant one-third decrease in the separatist region's foreign trade volume during the first quarter of 2024 compared to the previous year serves as a noteworthy indicator deserving close attention.¹⁴

III • Between European membership and reintegration with Transnistria

The renewed exploration of the relationship between European integration and the reintegration of Transnistria emerges as a pivotal concern for Moldova and its international allies, exerting a profound influence on regional development.

From the Moldovan government's perspective, the process of reincorporating Transnistria into the Moldovan framework cannot come at the expense of the nation's territorial integrity and sovereignty. Since the outset of her presidency, Maia Sandu has consistently emphasized that reintegration must not impede the country's European aspirations, which must proceed independently. In essence, Transnistria should not wield a veto over Moldova's foreign policy orientation, which leans towards Brussels rather than Moscow. Accordingly, reintegration is viewed as a gradual endeavor necessitating careful navigation to ensure a peaceful and enduring transition. This issue remains intertwined with the status of the Gagauz minority in southern Moldova, whose auton-

ous regional status has not fully assuaged tensions.¹⁵

Moldova's strides towards European integration have gained momentum since the onset of the conflict, culminating in the announcement of accession negotiation openings with Chisinau in December 2023, mirroring Ukraine's trajectory. Initiated by President Voronin in 2005, the integration process has been bolstered over time by the establishment of two specific missions aimed at supporting Moldova's leadership endeavors: the EU Border Initiative (EUBAM in 2005) and the EU Partnership Mission (EUPM in 2023). While the former mission is geared towards addressing the Transnistrian conflict through border management and combating cross-border crime, the latter seeks to fortify state and societal resilience against destabilization efforts from Russia.

The endeavor to reintegrate Transnistria into Moldova necessitates deliberation on factors pertaining to public sentiment and institutional frameworks. Despite shifts in the regional landscape, **reintegration remains a peripheral concern for Moldovan public opinion**, greeted with caution and, even, relative indifference.¹⁶ Moreover, the prospect of reintegration risks bolstering pro-Russian factions within the Moldovan electorate. Accessing Transnistrian public sentiment remains challenging, although the presence of several thousand Transnistrians working in Chisinau presents a unique opportunity to foster people-to-people ties and enhance mutual understanding. Institutionally, the PAS government, under Maia Sandu's leadership, has prioritized enhancing the administrative capacity of the Moldovan state, particularly in preparation for negotiations with the EU. To spearhead reintegration efforts, the government has appointed a deputy prime minister, Oleg

¹⁴ <https://www.mold-street.com/?go=news&n=18145>

¹⁵ Since the election in May 2023 of Governor Evghenia Gutul, a member of the party of the pro-Russian oligarch Ilan Shor, relations between the central authorities and the Gagauz region have deteriorated. Several episodes of conflict have followed, from suspicions of electoral fraud during the election itself to closer ties with Russia, marked in particular by multiple meetings between the governor and Vladimir Putin.

¹⁶ For instance, in August 2023, as per the Public Opinion Barometer by the Institute of Public Policy in Chisinau, only 1.9% of Moldovans considered separatism as the primary issue to address, ranking far behind concerns such as corruption or poverty. https://ipp.md/wp-content/uploads/2023/09/BOP_08.2023.pdf However, by April 2024, the fear of war emerged as the foremost concern when asked about the challenges inherited from Moldova's past that should be avoided in the future, with 38.5% of respondents expressing this sentiment ("Socio-political survey, CBS Axa / Watchdog, April 2024").

Serebrian, and established its own administrative body, the Office for Reintegration, tasked with coordinating inter-ministerial efforts in this domain.

In addition to sporting events and the Autocephalous Orthodox Church, which currently constitute elements of a shared domain between Transnistria and Moldova, Chisinau's current concern lies in gradually **expanding this shared space to encompass other domains, beginning with the economy.** In the coming years, the focus of reconciliation efforts should center on implementing sector-specific policies, ranging from the simplest to the most complex, adhering to a yet-to-be-defined timetable and budget.

In essence, while Transnistria may resemble a miniature Donbass, the prospects and potential for reintegration diverge significantly from those prevailing at the onset of the conflict in Ukraine.

• **Conclusion.** **Three scenarios about Transnistria for 2025-2026**

In the following scenarios, outlined in descending order of likelihood, we navigate through uncertain terrain, where the future is shaped by a myriad of dynamic factors.¹⁷ Despite this uncertainty, we have anchored our projections on several key assumptions, including the shared desire on both sides of the Dniester River to prevent a resurgence of conflict, the increasing influence of the European Union in the region, and the diminishing leverage of Transnistria.

Moreover, it is evident at this juncture that the primary unknown factor remains the trajectory of the conflict in Ukraine and its repercussions on the region. A Russia posi-

tioned further from Moldova's borders would wield less influence, whereas a Russian incursion into southern Ukraine, towards Odessa, would significantly impact the regional dynamics. Similarly, a resolution to the conflict resulting in a ceasefire akin to the situation in Korea would not yield the same outcomes as a comprehensive peace treaty establishing predictable norms for the continent.

I SCENARIO 1: GRADUAL REINTEGRATION WITH MOLDOVA

This scenario assumes that Russian troops stay away from the Ukrainian port of Odessa, and keep a reasonable distance from Transnistria. In this scenario, Maia Sandu is re-elected President in October-November 2024. She wins her referendum on European integration and does her best to secure a majority in parliament, despite strong internal polarisation and a powerful campaign to destabilise Russia.¹⁸ However, regional developments are inevitably leading Transnistria towards more concessions with Moldova: the result is strong internal tensions in Tiraspol, between transactional economic elites and political elites dependent on Moscow and its security services.

The progress of European integration goes hand in hand with European support for the costs of reintegration, which include higher energy prices, the dismantling of Transnistrian institutions and the conversion of military industries, as well as social costs and public services. Under these conditions, in successive stages, the idea of reunification becomes more attractive to the inhabitants of Transnistria, to the point of constituting a concrete political horizon by 2028-2029, with full reintegration by the end of the 2030s. In this scenario, Moldova manages to avoid the Ukrainian curse of de facto partition through annexation.

¹⁷ Among the interesting foresight exercises on Moldova, see: Denis Cenusa, "Tensions around the Transnistrian conflict in Moldova: early signs of an escalation scenario and future prospects", *Bulletin Eastern Europe Studies Centre*, 20 February 2024 <https://www.eesc.lt/en/publication/tensions-around-the-transnistrian-conflict-in-moldova-early-signs-of-an-escalation-scenario-and-future-prospects/>

¹⁸ On October 20, 2024, coinciding with the first round of the presidential election, Moldova will conduct a referendum regarding its European Union membership. The referendum aims to gauge citizens' desire to amend the Constitution, affirming Moldova's commitment to EU integration and preventing potential deviations from its pro-European path by future administrations. This event marks a pivotal moment in Moldova's political landscape since the onset of the war in Ukraine, see Florent Parmentier, "Moldova, a Political System Under Pressure Between European Aspirations and War in Ukraine", *Russia. Eurasia. Visions*, No. 128, Ifri, May 2023. https://www.ifri.org/sites/default/files/atoms/files/parmentier_moldova_2023.pdf

I SCENARIO 2: REGIONAL ESCALATION

In this scenario, the Russian front edges closer to Transnistria, exacerbating Ukraine's challenges with manpower shortages surpassing ammunition shortages in stabilizing the conflict beyond the Dniester by 2025. This complicates Ukraine's position further. Despite remaining vulnerable to Ukrainian operations, the Transnistrian authorities find themselves in a slightly less precarious situation than at the outset of the war. They closely monitor Moldovan counterparts, noting Maia Sandu's struggle to maintain a parliamentary majority due to her failure to forge alliances. Meanwhile, Transnistrian elites lean on Gagauzia, a staunch opponent of Sandu since her initial term, to extract concessions and impede or reverse European integration. Russian forces orchestrate incidents to heighten tensions between Chisinau and Tiraspol, seeking to disrupt communication across the Dniester. By aligning more closely, Russian leaders may pursue several courses of action: recognizing Transnistria's independence and annexing it, destabilizing Gagauzia to pressure Ukraine, or coercing Moldova into federalization, granting Russia an indirect veto power given its sway in Tiraspol. Either way, Moldova weakens, and anti-European integration forces in Chisinau gain strength. In such a scenario, Moldova meets a fate akin to Ukraine's, while Transnistria finds itself in a situation akin to the illegally annexed districts in eastern Ukraine.

I SCENARIO 3: THE STATUS QUO THROUGH THE REACTIVATION OF THE "5+2" FORMAT

This scenario stands out from gradual integration and escalation due to its uncertainty. The Transnistrian appeal, condemning "economic strangulation" in February 2024, didn't yield immediate consequences but contributed to the acknowledgment that a social and humanitarian crisis remains a looming possibility, one best avoided. By 2026-2027, as the conflict stagnates, European and Russian entities have begun exploring avenues to stabilize the European continent. This effort gains support from various national leaders and a diverse coalition within the European Parliament. While NATO is no longer a viable option for Ukraine and Moldova, discussions about bilateral security guarantees for different regions are widespread. In this context, Russian annexation becomes implausible, and gradual reintegration seems unlikely without external incentives. Maintaining the status quo under the guise of the "5+2" format has emerged as a diplomatic tool. Talks are underway to possibly expand the format to a "5+3," involving China, with the aim of rejuvenating the regional economy, particularly in light of major reconstruction efforts in Ukraine. While the possibility of resolving the conflict was plausible during Maia Sandu's second term, it has been deferred for the foreseeable future.

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