

MARITIME STRATEGIC EVALUATION FOR ISRAEL 2020/21

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Global Developments in the Maritime Domain

Shaul Chorev

As in previous year, although this report's assessment focuses on the East Med and the Red Sea, the occurrences in this arena may not be addressed separately from the recent global development of general, and in the maritime domain in particular, because of the close affinities between events in the global domain and their influence on the region near Israel.

The year 2020 was characterized by continued *global instability* in its geopolitical sense, manifesting by a weakening of world order based upon international rules and institutions which have been established since the end of World War II, leaving room, instead, to a more complex, fluctuating security setting we have experienced in the past few decades. Presently, the inter-state strategic competition fulfills the main objectives of national security policy of leading countries, particularly the United States' national security.

The present international order is undergoing a transition process driven by interactions between its main players; the United States, China and Russia, and to a lesser extent, the European Union. Other rising powerful countries undermining this order. If successful, they will eventually establish a multi-polar world order.¹ Russian president Vladimir Putin exploits both turning the utmost attention on the part of Trump's government in the United States to East Asia (Pivot to Asia Policy), as well as the European Union's economic and political disorder. The vacuum of power yielded by this policy of the United States in the East Med has encouraged Turkey and Iran to fortify their efforts to expand their influence in the East Med. In that sense, the agreement signed between Israel and the United Arab Emirates in September 2020 at the White House has driven a wedge in Iran's and Turkey's counter-proceedings. This trend of liberal global order alternation, which began even before 2020, was intensified due to the Corona pandemic, and the closure processes imposed upon the world by it, both in terms of people's movement and the movement of goods.

China is the main strategic competitor of the United States. It exploits its economic power to frighten its neighbors, as well as militarization of civil characteristics in the South China Sea. In recent years, China has begun to simultaneously "pull all the strings available to her". The conflict in the South China Sea has become a main source of international concern; its uncompromising conduct concerning Hong Kong's autonomy has accelerated. China has not been deterred by the wide media

1 Schultze, P. W. (Ed.) (2018). Multipolarity: The promise of disharmony. Frankfurt: Campus Verlag

coverage, either. The last military conflict with India left a few dozens of killed and injured soldiers of both parties. United States President Donald Trump and China's Deputy Prime Minister Li Hu signed an agreement at the White House in early January 2020. The agreement reduced some American customs on Chinese goods, in return to Chinese obligations to purchase more agricultural products from America, as well as energy products and industrial products, and to address complaints on the United States' part concerning intellectual property rights violation. However, phase 1 of the agreement has not been fulfilled (Beijing and Washington have not been able to expand the trade scope of goods indicated even prior to the Corona pandemic breakout). The analysts argue this state is continuous and will determine the scene further into the year 2020. The failure itself is not surprising, but its magnitude certainly is.²

Russia has proven to be a significant counterpart to the west, in the East Med in general, in Syria, and recently, particularly in Libya, fulfilling significant military and diplomatic roles in the region. Vladimir Putin possesses a sole, yet prominent vision, namely, to restore Russia's glory. In recent years, Russia has violated the boundaries of neighboring countries, vetoing their decisions of economic and diplomatic nature, as well as those related to defense. However, Russia's willingness to politically join forces with China, against the United States has recently raised some doubts. China's support of Belarus governor Alexander Lukashenko in recent years, through his attempt to maintain independence from Putin's Russia, who insisted on a more profound political and economic collaboration between Minsk and Moscow; as well as the Chinese attempt to impose on Russia the prices of fuel, a significant part of which is purchased from Russia (over thirty per cents), and considering the fuel export constitutes more than sixteen per cents of the Russian GNP – may lead Putin to consider *moderating his proceeding to seek a close connection with China in the years to come*.³ An evidence thereof is apparent through the Russian navy's prominent involvement in the bilateral exercise held early in September 2020 at the Bay of Bengal, as part of an exercise which has been held by the Indian Navy (China's strategic rival) every two years, since 2003, titled INDRA.⁴

2 Reuters Staff, What's in the U. S.- China Phase 1 trade deal, *Reuters Business News*, January 15, 2020. <https://www.reuters.com/article/us-usa-trade-china-details-factbox-idUSKBN1ZE2IF>

3 Stanislaw Skarzynski and Daniel Wongls, Putin's Russia Seeking a New Balance Between China and the West? *The Diplomat*, August 28, 2020. <https://thediplomat.com/2020/08/is-putin-russia-seeking-a-new-balance-between-china-and-the-west>

4 Abhijnan Rej, Indian and Russian Fleets Begin Exercise in the Bay of Bengal, *The Diplomat*, September 04, 2020. <http://thediplomat.com/2020/09/indian-and-russian-fleets-begin-exercise-in-the-bay-of-bengal>

The European Union: Prior to the Corona pandemic breakout, the European Union, newly led by Ursula von der Leyen, the European Commission president, planned to implement a more assertive approach in the Union's relationships with China and the United States. The new approach manifested itself by intensifying technological regulation, a stricter enforcement or implementation of trade and customs rules, and even by intensifying military collaboration between the countries remaining within the European zone. As the Corona virus arrived in Europe, the latter altered its core orientation; rather than fighting against the United States and China in the geopolitical domain, the Union is now focusing upon the struggle against the Corona pandemic.

The East Med has been characterized in the past year by rising in the degree of tension between Turkey, striving, in correspondence to the 'Blue Homeland Policy' (Mavi Vatan), to expand its scope of influence, and its domination over the East Med, and Greece and Cyprus.⁵ That is manifested through the signing of an internationally controversial agreement, dividing the economic water between herself and the Libyan regime in Tripoli, beginning gas search in the areas between Cyprus and Rhodes, relying upon navy forces, and challenging Greece, its main rival at this context. An ad-hoc coalition of countries, including Greece, Israel, Egypt and Cyprus was established, resisting this activity on Turkey's part. This coalition has avoided carrying out a military confrontation against Turkey, in spite of its opposition toward its activity. Rather, they merely performed joint naval exercises.⁶

The Persian Gulf and Gulf of Oman Area constituted a sphere of collision between Iran and the United States, Britain and the gulf countries in spring 2019. The event involved damage to tankers carrying petroleum. Both parties were on the verge of an extensive, direct conflict. The United States moderated the tension in the area by temporary ban of direct military response, but set out to dissuade Iran from carrying out its nuclear plan by announcing new sanctions. Apparently, in spite of the rhetoric, neither the United States nor Iran is interested in a true military confrontation. As of summer 2020, both the United States and Iran were struggling against Corona virus breakouts. Hence both parties are less likely to be driven into taking military actions against one another.

5 Ami Ayalon and Shaul Chorev, the 'East Med' is the crucible for the region's problems, *The Jerusalem Post*, August 24, 2020. <http://euro-sd.com/2020/03/allgemein/16506/military-cooperation-between-israel-greece-and-cyprus>

6 Military Cooperation between Israel, Greece and Cyprus, *European Security & Defense*, March 10, 2020. <https://euro-sd.com/2020/03/allgemein/16506/military-cooperation-/between-israel-greece-and-cyprus>

The International Relationships and the United Nations' Standing The Corona pandemic negatively affected the international relations between many countries, intensifying and causing an escalation of diplomatic controversies, resulting in a wide diplomatic tension. Although the United Nations Security Council made a decision entailing a global truce, the matter has not seemed to be supported by the council members, in the practical sense. The diplomatic relations have been significantly affected by the tension related to trade and shipping of medications, diagnostic tests and hospital supplies for the purpose of coping with the Corona virus disease. Leaders of several countries accused other countries for not curbing the disease effectively, causing an uncontrollable spread of the virus. Other accusations came from developing countries in Latin America and Africa, stating they were not able to find a sufficient quantity of materials for testing Corona disease, one reason being that other European countries and the United States were wasting the supplies in discussion.⁷

The Security Environment has become all the more complicated because of rapid technological changes occurring global, challenges posed by rivals of all various spheres of action, including the space and cybernetic spheres (The Cybers), as well as computerization and artificial intelligence technologies. For example, based upon media reports, Iran attacked Israel's water infrastructure, and Israel, in turn, responded on 9th May, 2020 by a Cyber attack against infrastructures at the Iranian port of Bandar Abbas.⁸ Those challenges within the security environment are becoming even more complex at surroundings where the mass media fulfills an important roles, responding within a short time to events taking place anywhere in the world. This progress of communication technology and general accessibility of other technologies empower so-called non-state players, who will exponentially expand their ability to influence people and events, both within the state and global.⁹

Immigration and Urbanization Phenomena displayed by some populations add more burden for the countries of destination for the immigrants, as well as a crisis in their civil society. The latter may induce an increased escalation and the development of nationalist regimes in liberal-democratic states. The Syrian civil war has radically changed the Middle East area, resulting in a humanitarian disaster encompassing

7 Bradley, Jane, In Scramble for Coronavirus Supplies, Rich Countries Push Poor Aside, The New York Times, April 9, 2020. <https://www.nytimes.com/2020/04/09/world/coronavirus-equipment-rich-poor.html>

8 El Jazeera, Israel cyberattack caused 'total disarray' at Iran port: Report, May 19, 2020. <https://www.aljazeera.com/news/2020/05/israel-cyberattack-caused-total-disarray-iran-port-report=200519163117789.html>

9 National Intelligence Strategy, of the United States of America 2019. Pp. 4–5. <https://assets.documentcloud.org/documents/5691327/National-Intelligence-Strategy-2019.pdf>

more than half a million dead, and millions of refugees who fled to Turkey, Lebanon, Jordan and Europe, inducing the conditions for the above mentioned occurrences. The immigration to Europe has occurred mainly through the sea, both from Syria (through Turkey) and North Africa, mostly through Libya. Areas where the economic scarcity is harsh, lack of various civil services (water, electricity etc.), climate changes, breakout of infectious diseases, or multi-national crime organizations may be conducive for development of instability isles or Failed States.

The growing number of "defective" democracies global arouses the concern of liberal democracy's decline of power. Thomas Ambrosio portrays and explains the burnout of democracy's legitimacy. Russia's rise to power under Putin's rule, and China's, under Xi Jinping's rule signifies a change in the international system's normative structure. Democracy is no longer the dominant paradigm. The authoritarian regimes possess consistently growing Soft and Sharp power¹⁰ to exercise. The rise of right-winged, populist, is also a complementary factor to the dissatisfaction with democracy and the increasing desire of authoritarian government models.¹¹

In the **global economy** field, the trend addressed in previous report has continued, namely, a gradual transformation at the Center of Gravity in the geopolitical, economic and geo-strategic fields from the *west toward Eastern Asia*. A new research by McKenzie & Company presents the GDP transition speed toward Eastern Asia. As of 2019, Eastern Asia holds a growing share of trade, capital people, knowledge, transportation, culture and resources. Out of eight global boundary-crossing flow types, only waste flows in the opposite direction, reflecting the decision made by China and the other Asian countries to reduce waste importation from developed countries. Presently, Asia constitutes approximately one-third of world trade in terms of merchandises, compared to a quarter ten years ago. Approximately at the same time, some of the international passengers movement through civilian flight increase from 33% to 40%, and its part within the capital flow raised from 13% to 23%, a change resulting from the increasing importance of this area, being highly significant for global economy's development. If this trend continues, by 2040,

10 Sharp power is the use of manipulative diplomatic policies by one country to influence and undermine the political system of a target country.

11 Ambrosio, T. (2018). Authoritarian norms in a changing international system. *Politics and Governance*, 6(2), 120–123.

Eastern Asia countries are likely to produce more than fifty per cents of the world GDP, consuming nearly 40% of world's consumption.¹²

World growth is expected to decline by 4.9% in 2020, 1.9 percentage points below the global economy forecast, as of April 2020. The Corona pandemic's negative effect was greater than expected on activity during the first half of 2020. The recovery therefrom is expected to be more gradual than predicted in previous forecasts.¹³

The Coronavirus Pandemic

In 2020, the above reviewed transformations and challenges were further intensified by Corona pandemic, which has taken millions of lives all over the world. A few political science researchers are questioning whether the pandemic may be considered an Inflection Point in the international relations field. Some argue that economic and medical evolutions have reduced the geopolitical influence of pandemics in past centuries. They state that examining the way in which the new Corona virus has affected the division of power and interest during the first half of 2020 indicates that the Corona virus' effect on global politics will not be a transformative one.¹⁴ Other researchers, on the other hand, indicate that United Nations' Security Council's reluctance to "take charge" of the Corona pandemic, being a so-called "global event", arousing the concern that the escalating crisis may resort to international conflicts. The WHO (World Health Organization), which was supposed to be the "global projector", managing the crisis, has not received any support on the United States' part, which has ceased fiscally supporting the organization even before the crisis broke out. If the Corona crisis continues, it may cause the escalation of economic, social and even political tensions, which may lead more countries to follow the United States, namely, cease their fiscal support of the World Health Organization. Under such a scenario, the United Nations shall remain with limited resources on hand, restricting its ability to undertake the responsibilities entailed by a "global projector", as well as to maintain the steps already taken by the organization in various areas global. Sadly, ceasing fiscal support of such parties

12 McKenzie & Company, the future of Asia: Asian flows and networks are defining the next phase of Globalization, September 18, 2019. <https://www.mckinsey.com/feature-insights/asai-pacific/the-future-of-asian-flows-and-networks-are-defining-the-next-phase-of-globalization#> [Accessed September 20, 2020].

13 WORLD ECONOMIC UPDATE, June 2020.

14 Daniel W. Drezner, The Song Remains the Same: International Relations After CORONAVIRUS, *International Organization* 74, Supplement 2020, The IO Foundation, 2020, 1–18. <http://www.cambridge.org/core/journals/international-organization/article/song-remains-the-same-international-relations-after-covid19/C0FAED193AEBF0B09C5ECA551D174525>

during the Corona pandemic times may serve as a dangerous precedent in global diplomacy and international relations. The same applies not only for the health sectors, but also on other related sectors. At this context, it is noteworthy that aside from the Corona pandemic, the world is still subject to other severe, harsh threats, such as climate changes and hunger. The World Food Program has indicated that by the end of this year, consequently to the Corona virus emergence, the number of individuals facing acute hunger will have doubled, its rate reaching to more than 265 million individuals. Such a regression may also cause improvements that have been already attained in recent years, to dissipate completely.¹⁵ The latter applies particularly to the Paris agreement.

Prior to the pandemic breakout, the volume and value of maritime trade shipping the global supply of food, energy and raw materials, as well as finished products and industrial components constituted more than 108.9 trillion ton/km² per year. The latter maritime trade encompassed more than 80% of the global trade's volume, and 60%-70% of the global trade's value. Two million seamen operated the global merchant navy, which rendered maritime transportation essential for the thriving of sustainable development.¹⁶ However, as indicated by the early response to CORONAVIRUS pandemic spread moderation, the actions taken by countries, including travel restriction and border closure, negatively affected the global connectivity as far as all transportation sectors were concerned (continental, maritime and aerial), which, in turn, resulted in disruptions of supply chains and global trade flow (See Figure 2).

Consequently, the availability and supply of essential products, such as food or medications became more complicated, impairing countries' ability to respond to the pandemic and recover therefrom. The seamen community itself, too, suffered the inability to be assigned to ships and get off, mainly due to movement limitations imposed by certain countries, and restricting passenger flights, rendering seamen Corona crisis victims. Tens of thousands of the latter failed to get off the ships on which they had served very long time periods, nor join ships and replace existing

15 Zaheer Allam, Oil, Health Equipment, and Trade: Revisiting Political Economy and International Relations During the CORONAVIRUS Pandemic, *Surveying the Coronavirus Pandemic, and its Implications*.

16 IMO, Coronavirus (CORONAVIRUS) – Joint Statement on the contribution of international trade and supply chains to a sustainable socio-economic recovery in CORONAVIRUS times, Circular Letter No.4204/Add.31 17 September 2020. <http://www.imo.org/en/MediaCentre/HotTopics/Documents/COVID%20CL%204204%20adds/Circular%20Letter%20No.4204-Add.31%20Coronavirus-%20Joint%20Statement%20On%20The%20Contribution%20fInternational%20Trade.pdf>

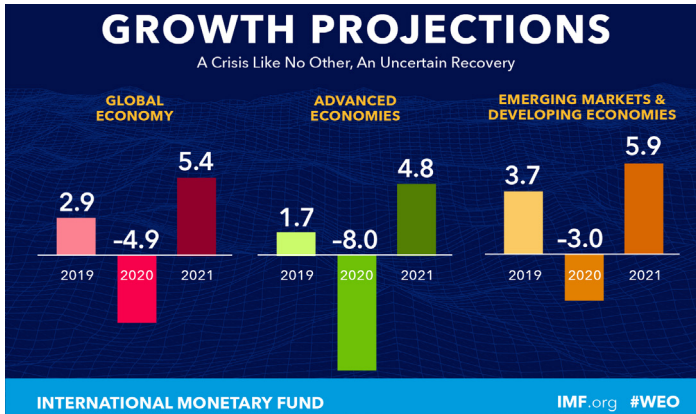


FIGURE 1: Economy Growth Projections, as of June 2020

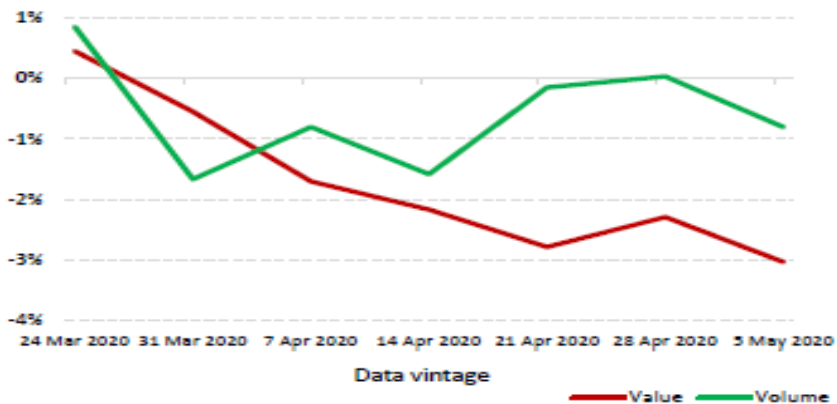
TABLE 1: An Updated Global Economic Growth Forecast (Annual GDP Changes, in Percentage)

(real GDP, annual percent change)	PROJECTIONS		
	2019	2020	2021
World Output	2.9	-4.9	5.4
Advanced Economies	1.7	-8.0	4.8
United States	2.3	-8.0	4.5
Euro Area	1.3	-10.2	6.0
Germany	0.6	-7.8	5.4
France	1.5	-12.5	7.3
Italy	0.3	-12.8	6.3
Spain	2.0	-12.8	6.3
Japan	0.7	-5.8	2.4
United Kingdom	1.4	-10.2	6.3
Canada	1.7	-8.4	4.9
Other Advanced Economies	1.7	-4.8	4.2
Emerging Markets and Developing Economies	3.7	-3.0	5.9
Emerging and Developing Asia	5.5	-0.8	7.4
China	6.1	1.0	8.2
India	4.2	-4.5	6.0
ASEAN-5	4.9	-2.0	6.2
Emerging and Developing Europe	2.1	-5.8	4.3
Russia	1.3	-6.6	4.1
Latin America and the Caribbean	0.1	-9.4	3.7
Brazil	1.1	-9.1	3.6
Mexico	-0.3	-10.5	3.3
Middle East and Central Asia	1.0	-4.7	3.3
Saudi Arabia	0.3	-6.8	3.1
Sub-Saharan Africa	3.1	-3.2	3.4
Nigeria	2.2	-5.4	2.6
South Africa	0.2	-8.0	3.5
Low-Income Developing Countries	5.2	-1.0	5.2

Source: IMF, *World Economic Outlook Update*, June 2020

Note: For India, data and forecasts are presented on a fiscal year basis, with FY2020/2021 starting in April 2020. India's growth is -4.9 percent in 2020 based on the calendar year.

teams. As of August 2020, it was estimated that more than 300,000 seamen had been required to board or get off merchant ships. The global merchandise trade declined by 17.7% in May 2020, compared to the same month in 2019. The decline within the first five months of this year was widespread, yet affected export from the United States, Japan and European Union particularly. The economic shrink in China was smaller than the global average, since the latter successfully controlled the pandemic breakout, and was relatively swift in re-opening its economy.



Source: UNCTAD calculations

Figure 2: Decline in Trade Scope and Its Fiscal Value Consequently from CORONAVIRUS Pandemic

The CORONAVIRUS pandemic has not passed over *combat fleets*, either, even if some of the effects have remained uncovered, or hidden from the wide public. The media case which has reverberated most due to its command-related implications involved the Theodore Roosevelt aircraft carrier in March 2020, during an operational sailing. The crew members who were infected with CORONAVIRUS were evacuated, and the ship was called for anchorage at Bay Guam (an island under American patronage in the western Pacific Ocean). The captain, Colonel Brett Crozier, was interested in evacuating most of the ship crew, in order to prevent the pandemic spread, but his supervisors were deterred by the idea. A few days later, the colonel sent an e-mail message to three of his superior officers, and to the remaining seven navy captains, outlining a massive ship evacuation plan, since the virus may have not been tolerated on board. The letter was leaked to the press. On the next day, the fleet instructed to take off most of the crew to shore. Thomas Modly, Deputy United State Navy Secretary, suspended ship captain from its position. Modly's actions were controversial, and his later speech addressing the crew on board Theodore Roosevelt was publicly criticized. Consequently, Modly resigned from his position a

few days later. By mid-April, hundreds of crew members, including Crozier himself tested positive for CORONAVIRUS. One of them passed away. The Committee of Inquiry appointed by the United States Fleet to investigate the event submitted its conclusions on 19th of June, stating the Crozier's decisions in relation to handling the pandemic were erroneous, recommending not to return him to aircraft carrier commanding position.¹⁷

The United States Navy, which was involved in the struggle against the Coronavirus made its hospital ships USNS Comfort and USNS Mercy available to New York City and Los Angeles, respectively. Mercy left Los Angeles port on 15th of May, after having treated only seventy seven patients, who were not infected with Coronavirus. Meanwhile, Comfort return to its home port, namely, Norfolk, Virginia two weeks earlier, having treated 182 patients n New York City. The missions in both cities, and the few patients treated aboard both ships raised again questions concerning the future of those two veteran ships, which are not designated to be replaced by new ships according to the United States Navy Force Construction Plan.¹⁸

The pandemic affected other fleets' activity as well. For instance, the Royal British Navy postponed the sailing of HMS Queen Elizabeth for training, which was scheduled for early September, because several crew members tested positive for Coronavirus.¹⁹

Global Maritime Trade: Key Trends

More than eight per cents of the global trade by volume, and more than seventy per cents of its fiscal values are shipped by sea. Being handled at the different sea ports around the world, the contribution and importance of maritime transportation for global trade and its development, are impossible to overstate. The Seamanship and sea ports constitute the spearhead of globalization, which, in recent decades, have brought about prosperity to consumers and suppliers both in developed and developing countries. Acknowledging the strategic role fulfilled by this sector,

17 Schmitt, Eric; Gibbons-Neff, Thomas (19 June 2020). "Navy Inquiry Faults Two Top Officers Aboard Roosevelt for Handling of Virus", *The New York Times*. <http://www.nytimes.com/2020/06/us/politics/carrier-roosevelt-coronavirus-crozier.html>

18 Gidget Fuentes, Beyond Mercy: Navy's COVID-19 Hospital Ship Missions and the Future of Medicine at Sea, USNI News, May 25, 2020. <http://news.usni.org/2020/05/25/beyond-mercy-navys-covid-19-hospital-ship-missions-and-the-future-of-medicine-at-sea>

19 The HMS Queen Elizabeth has postponed sailing from Portsmouth after crew members tested positive for COVID-19, *BBC News*, September 7, 2020. <https://www.bbc.com/news/uk-england-hampshire-54064886>

all structures addressing sustainable development put emphasis on this sector, perceiving it as a driving force for growth and sustainable development.

Economic growth is clearly linked to the increase in maritime trade. Researches addressing the matter indicated that a one-percent of global economic growth expanded trade scopes by 2.5 per cents.²⁰

While the global trade had already slowed time by the Corona pandemic breakout, the economic and social disruptions resulting from the pandemic caused a dramatic decline in trade (Figure 3). The value of international trade in terms of merchandises declined by approximately five per cents in the first quarter of 2020, and is expected to decline further, by 27 per cents in the second quarter of 2020.²¹ Figure 4 hereunder presents the substantial decline in the first and second quarters of 2020.

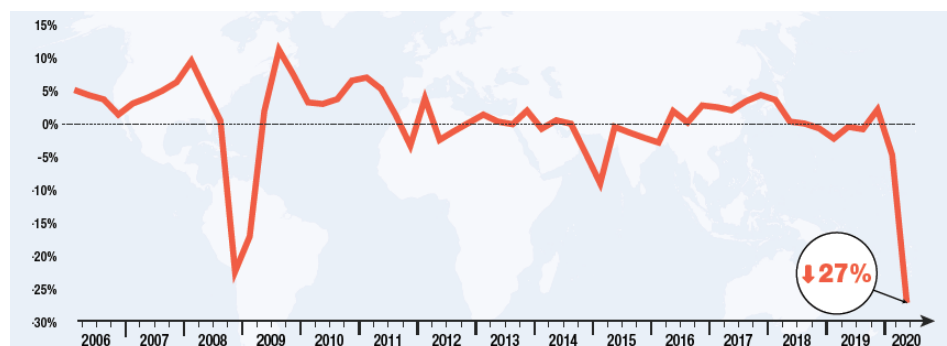


Figure 3: Trade Contraction due to Coronavirus vs. the 2008-9 Economic Crisis

A statistical research conducted in several large economies further emphasizes the dismal situation of international trade. Firstly, the up-to-date trade data indicate further decline in April and May. Secondly, except the first two months of 2020, the data pertaining to *China* indicate that the latter was more successful than other large economies, demonstrated the growth in China's export by three per cents in April 2020. Nonetheless, the other data pertaining to China indicate that such a recovery might be short-term, since import and export declined by approximately eight per cents in May 2020. Additionally, the intra-regional trade seems to have declined by

20 Cristina Constantinescu, Aaditya Mattoo, and Michele Ruta, The Global Trade Slowdown: Cyclical or Structural? IMF Working Paper. 2015 International Monetary Fund, January 2015
<https://www.imf.org/external/pubs/ft/wp/2015/wp1506.pdf>

21 Global Trade Trends and short-term forecast, Trade contraction from COVID-19 deeper than the financial crisis, *UNCTAD*, June 20, 2020, P. 2
https://unctad.org/en/PublicationsLibrary/ditcmisc2020d2_en.pdf

a significantly lower rate as far as Eastern Asian countries and the Pacific area are concerned. In the European Union, the intra-regional trade declined at a rate similar to that of the general trade. However, the statistical data pertaining to the United States indicate a much substantial decline in intra-regional trade

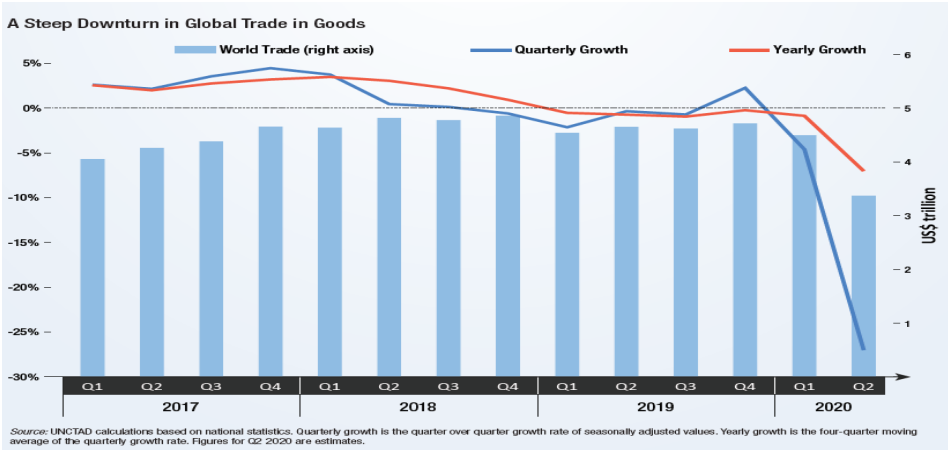


Figure 4: The Substantial Decline in Merchandise Global Trade in the First and Second Quarters of 2020

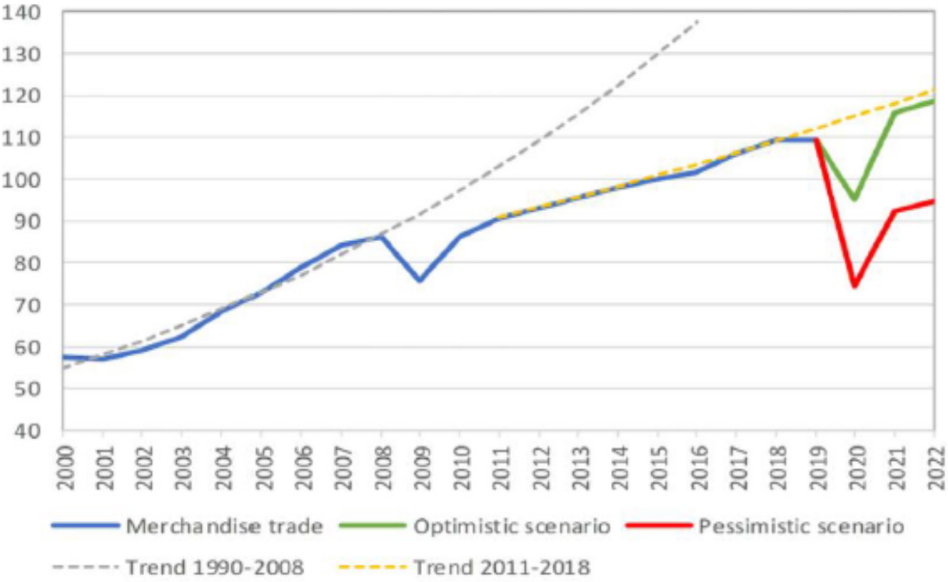


Figure 5: World Trade Volume Declined, Compared to the 2000 Trend (World Merchandise Trade Volume, 2000-2022. Source: WTO)

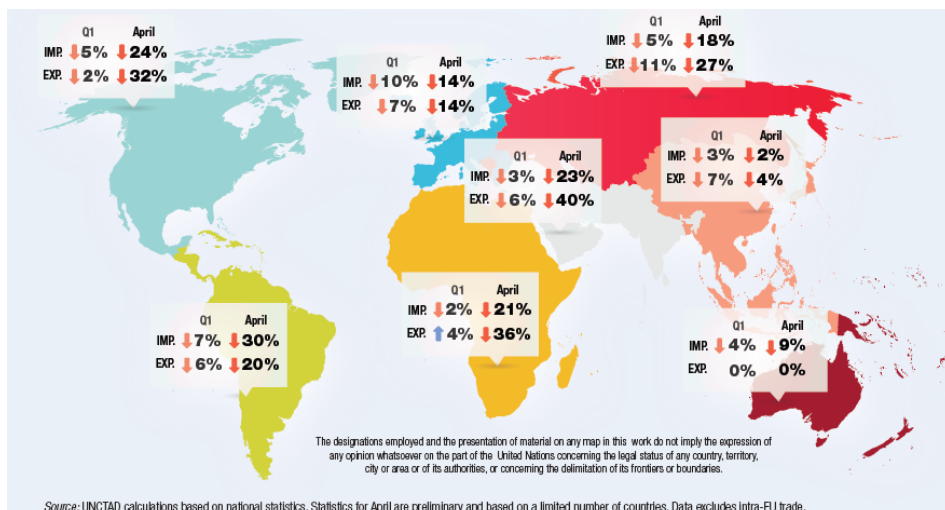
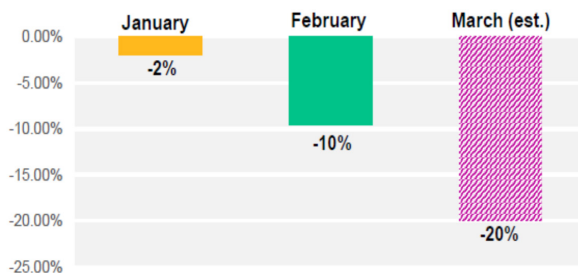


Figure 6: World Trade Decline by Areas



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Figure 7: Change in Container Shipping Volume, 2020

The demand for petroleum and tanker fleet condition: As of late 2019, the worldwide petroleum tanker fleet was of approximately 568 Dead Weight Tons capacity. Despite the increase in manufacturing relying upon alternative energy sources, the fossil fuel is still the main energy source. The completion of new tanker construction, coming from Chinese shipyards will be slightly lower than the previous forecasts. Petroleum product tankers' shipping rates will be negatively affected by the essentially low demand. Nevertheless, the Baltic and International Maritime Council (BIMCO) predicts that the average shipping rate per year will be higher than Breakdown Levels.²²

22 Peter Sand, Shipping in a time of coronavirus, *Windward*, March 19, 2020 <https://wnwd.com/insights/shipping-in-a-time-of-coronavirus>

The termination of collaboration between OPEC (The Organization of the Petroleum Exporting Countries) resulted in a dramatic increase of the exportation of fuel from Saudi Arabia. However, the Coronavirus pandemic drastically decreased the global petroleum demand. The forecast states that the global consumption will be reduced within the annual calculation pertaining to 2020, compared to the previous year. The vehicle fuel demand declines, particularly as far as jet fuel is concerned, due to civil volume reduction of civil flights and economic activity during Coronavirus pandemic times.

Relying upon the fuel tankers as a reservoir for surplus supply during Coronavirus pandemic times: The imposing of lockdowns during Coronavirus pandemic times, so as to slow the spread of the disease has lowered the global demand of various fuel types by 30 million barrels a day, worsening supply surplus, while the land fuel storage capacity had neared the possible maximum by April 2020. Consequently, fuel manufacturers began using Super Tankers as an alternative means storing their crude oil stock. Such super tankers, possessing the capacity to store approximately two million petroleum barrels, charged a storage fee of more than five dollars per barrel a month, five times higher than the previous year's fee. By late April 2020, the quantity of stored at sea had reached 140-160 million barrels.²³

China's Surplus Trade substantially expanded to 58.93 billion dollars in August 2020, compared to 34.72 billion dollars in the same month of the previous year, and far beyond the market forecast of 505 billion dollars (See Figure 8). The export increased by 9.5 per cents, the most rapid rate since last March, while import surprisingly declined by 2.1 per cents. The surplus trade with the United States in the country escalated to 34.24 billion dollars in August 2020, compared to 32.46 billion dollars in July.²⁴

In the global shipping area, the three leading *Flags of Registration* happen to belong to economies that are not key ship owners, such as Panama, Marshall Islands and Liberia. Hong Kong and Singapore follow, placing fourth and fifth, respectively.

Nearly a half of the global tonnage is owned by Asian companies, followed by European and North American owners. China owns the highest rate of ships, yet the Greek and Japanese merchant fleets possess a greater tonnage.

23 Oil tankers fill up as coronavirus crushes crude demand, Hellenic Shipping News Worldwide, April 30, 2020. <https://www.hellenicshippingnews.com/oil-tankers-fill-up-as-coronavirus-crushes-crude-demand>

24 China Balance of Trade, Tradingeconomics <https://tradingeconomics.com/china/balance-of-trade> [Accessed October 3, 2020]

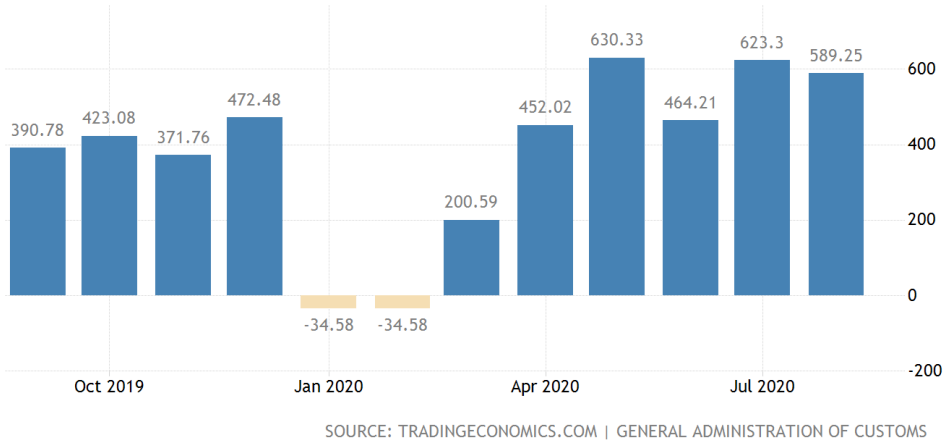


Figure 8: China's Surplus Trade October 2019-July 2020

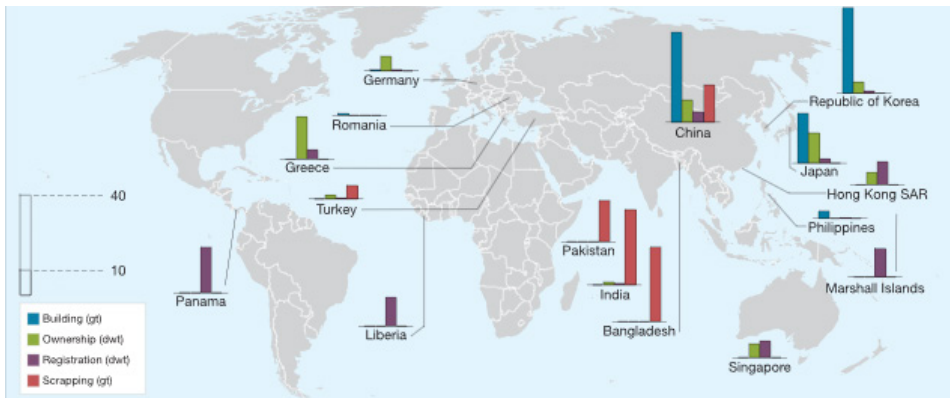


Figure 9: Vessel Building, Vessel Ownership, Vessel Registration and Scrapping by Geographic Area²⁵

New Sailing Passages

In recent years, the desire to deal with the problems related to the presently existing Choke Points has manifested itself by pretentious plans for digging new canals and expanding presently existing canals worldwide. More than two years ago, the expansion of Suez Canal came to a successful completion. Two pretentious digging enterprises remained on the agenda; Nicaragua Canal in Central America and Kra Canal at the center of Thailand. Generally, it may be stated that those two enterprises

25 Sources: UNCTADstat (UNCTAD, 2018a), Clarksons Research. <http://stats.unctad.org/handbook/MaritimeTransport/MerchantFleet.html> [Accessed October 3, 2020]

have not progressed. Apparently, the execution thereof in the near future is not on the agenda.

Kra Canal: Despite the agreement signed between China and Thailand in 2016, concerning a long-term construction project of the Kra Canal, otherwise known as the "Thai Canal", no significant progress has been made on this project. The canal is supposed to cross the Kra area, in the southern part of Thailand, providing a new sailing passage shortening the sailing time from the east to Europe, by bypassing Malacca Straits. In September 2020, the Thai government seemed to look into a continental transportation alternative to the proposed canal, thereby also annulling China's hopes for a strategic alternative to Malacca Strait. Now, Thailand also investigating the establishment of two deep sea ports, as well as a continental connection (a train and a road) between them. If and when this plan materializes, as far as ordinary merchandises will shorten by two to three days the duration of merchandises arrival from East Asia to Bengal Bay, as stated by the Thai Minister of Transportation Saksiam Chidchob.²⁶

A matter worth investigation is the establishment of continental logistic corridors, one of which, being applicable for the Middle East, is addressed in an article within this assessment.

The Passages in the Arctic Oceans

In the past year, and consequently to the expeditious iceberg defrost trend, the use of the Transpolar Passage as from the second half of the century (2050) has come on the agenda (Figure 10). The greatest extent of interest is shown precisely by the Chinese government, who views the passage as an alternative route to its target markets.

The disappearance of the Arctic sea ice, even for one summer, as indicated by the document assessing the Marine Arctic shipping, will cause "the disappearance of perennial sea ice in the middle of the Arctic Ocean".²⁷

Such a scenario bears substantial implications on planning, construction and operational standards of all future Arctic marine activity. In the absence, of hard,

26 Thailand Takes a Step Back from Kra Canal Proposal, The maritime Executive, September 21, 2020. <https://www.maritime-executive.com/article/thailand-takes-a-step-back-from-kra-canal-proposal>

27 Arctic Council, Arctic Marine Shipping Assessment 2009 Report, Arctic Council Norwegian Chairmanship 2006-2009, P. 34. https://www.pame.is/images/03_Projects/AMSA/AMSA_2009_report/AMSA_2009_Report_2nd_print.pdf

perennial ice, any water refrozen will take the form of seasonal ice, which will be much thinner and possible to pass through. In other words, no nuclear-powered icebreakers will be necessary (with which Russia is presently equipped). In the following decades, in the summertime, there may be a passage through the Arctic Ocean in a regular ship, even if the insurance company and polar code still require icebreaker ships.



Figure 10: The Transpolar Passage – Icebergs' Condition as of Mid-Century (2050)

While most of the world does not approach the climate changes surrounding us with the proper severity, China is the only country preparing for the matter. The world's greatest nation follows the rapid global warming with great interest. Even if humanity ceased emitting all greenhouse gasses, those which had already been emitted into the atmosphere would cause long-years warming effects. Since the world apparently is not doing enough to limit our greenhouse gasses emission, a warmer world is awaiting us, where the arctic ice cover might disappear in the summertime by 2050, or even earlier.

In its arctic policy, published in January 2018, China refers to the Trans-Arctic route as "The Main Passage". China does not address the phenomenon in a dramatic tone, yet in the same matter-of-factly tone typical of the Chinese policy documents: "... the arctic shipping passages include the northeastern passage, the northwestern passage and the main passage". The Chinese Arctic policy also mentions the polar Silk Road, which is often viewed as a synonym to the northern Via Maris. Let it be borne in mind, however, that this policy indicates that China strives to established a

polar silk road, by collaboration with other interested parties, through arctic shipping passages development".²⁸

A report issued for the American Congress, updated in September 2020, indicates that the American fleet has issued a series of strategy documents and route maps in recent years, addressing geopolitical and geostrategic aspects in the Arctic area.²⁹ The last one is a strategic forecast published in January 2019, stating the American Navy shall protect the United States from an attack, maintaining the nation's strategy and its influence in the Arctic area. The marine forces shall act to deter any type of aggression and maintain peace in the area. As for the crises which might break out in the area, the strategy states crises are to be resolved under conditions accepted by the United States, its allies and partners.

The following strategic objectives were assigned for the American Navy in the strategy document published in 2019:

- Protect the American sovereignty and nation from attack.
- Guarantee continued stability and conflict avoidance in the Arctic area.
- Maintain freedom of navigation and navigation
- Promote partnerships of intra-American parties, as well as partnerships with allies and partners to attain the above objectives.

Aside from the thorough reviews given in the Congress' report on the matter, there appears to be no clear policy on the United States' part also converted into the means to be developed through building up the American force for the decades to follow. Also, United States does not seem to acknowledge the area as a potential inter-power struggle area.

As for the environmental influences of sailing through those routes, there is some concern that the ships sailing in the area, continuing the use of the heavy fuel type labeled mazut, will worsen the situation due to emission effects of detrimental nitrogen and sulfur oxides, as well as black carbon particles, which remain longer in a marine environment. Antarctica prohibits the use of heavy fuel, yet this prohibition has not yet been enacted by the International Marine Organization (IMO) in the Arctic area.³⁰

28 Mia Bennett, The Arctic Shipping Route No One's Talking About, *The Maritime Executive*, August 5, 2019. <https://www.maritime-executive.com/editorials/the-arctic-shipping-route-no-one-s-talking-about>

29 Changes in the Arctic: Background and Issues for Congress, Updated September 10, 2020, pp. 127–128. <https://gas.org/sgp/crs/misc/R41153.pdf>

30 *The Northeast Passage and Northern Sea Route* by Willy Østrem

Exclusive Maritime Borders – Contribution and Issues Under Conflict

In relation to the Delimitation of the Maritime Borders between neighboring countries, there is still an ample number of inter-state controversies concerning the exclusive maritime area borders, as well as controversies associated with fishing rights in those areas. The prominent conflict pertaining to the matter, which has by now become an inter-power conflict is taking place in China Southern Sea. The up-to-date review of this conflict's status appears in an article by Dr. Benny Ben Ari, within this report's framework.

In the East Mediterranean area, the following three unresolved crucial controversies have still remained:

1. Northern Cyprus' filed prosecution by Turkey for part of the maritime borders surrounding Cyprus.
2. Turkey's demand from Cyprus and Greece for part of Cyprus' and Greece's exclusive maritime borders (see a chapter in this review outlining Turkey's blue homeland policy). The main conflict between Turkey and Greece is related to the question whether settled islands are entitled to maritime borders. The 1982 maritime convention supports the Greek argument, but full acceptance of Greek demands is rather problematic from the Turkish viewpoint, as its shore in the Mediterranean is long (approximately 1800 kilometers), but a rather limited maritime border area.
3. The Israel-Lebanon Conflict concerning the delimitation of maritime border between both states. In correspondence to the policy document published by HMS on the matter, and the renewed mediation efforts by the American Deputy Minister of Foreign Affairs, Middle East, HMS published several position papers on the matter.³¹ The large-scale explosion at the Beirut port on the 4th of August this year, too, made the Lebanese capital vibrate with shock. The explosion, in which hundreds of people were killed, and thousands were injured left more than three hundred thousand people homeless, took place in Lebanon which by then had already collapsed economically, struggling against the Corona pandemic breakout, as well as against the greatest than ever trust gap between the citizens and the states. Apparently, governmental negligence caused the explosion of thousands of kilograms of a volatile chemical, which had been improperly stored at the port for years. If Israel seeks routes to assist the Lebanese nation after the

31 See Benny Shpanier's research titled Paths of Peace: Inquiring the Conflict of Israel-Lebanon Maritime Border Conflict from the Maritime Law Viewpoint, Heikin Geostrategy Cathedral and the Haifa University Maritime Policy and Strategy Research Center, July 2019 <https://ch-strategy.hevra.haifa.ac.il/index.php/studies-and-publications/books>

disaster it experienced, this is indeed an important route, which, if successful, will facilitate Lebanese search under water, which may even result in revealing a natural gas field, that might be of assistance to Lebanon in the following years. Even if Israel is obliged to compromise, there is an opportunity not to be missed.³² This activity does not mar Israel's interest in economic zone regulation. Israel must hold the bull by the horn, namely grab the opportunity to have an attentive mediator for Israel on the one hand, and a window of opportunities in Lebanon on the other hand, and thereby transform a reality which has lasted many years. Another energy rig in the Mediterranean Sea will probably serve both Israel and Lebanon well.³³

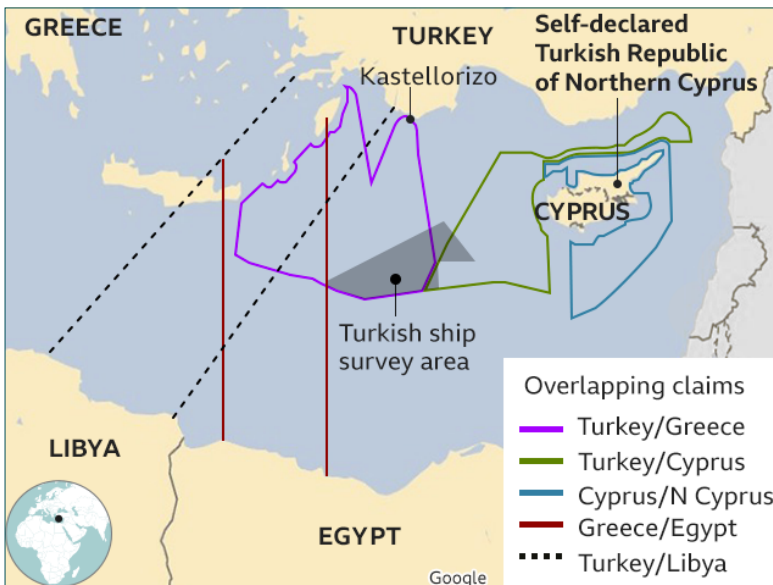


Figure 11: Areas of Conflict at the East Mediterranean, Including the Gas Search Field.

Source: BBC

In October 2020, the spokesperson of Israeli Ministry of Energy published the following message:

Minister Steinitz confirms: Israel and Lebanon shall engage in direct contact with American mediation concerning the economic zone between them ... At a conference which took

32 Shaul Chorev and Benny Shpanier, A Propitious Time Not to be Missed, *Yisrael Hayom*, 14 September 2020. https://www.israelhayom.co.il/writer_articles?tid=134014

33 Pazit Rabina, Experts: Israel May Reach an Agreement with Lebanon Concerning the Marine Border, *Makor Rishon*, 21 September 2020. <https://www.makorishon.co.il/international/266647>

place about two weeks ago, headed by the Minister of Energy and his senior officers, also involving parties from the offices of the Prime Minister, and Ministries of Law and Defense, Israel's negotiation terms were established. The breakthrough between both countries was documented briefly afterward, during the recent visit of the David Schenker, Assistant Secretary to American Foreign Affairs Minister.³⁴

The above mentioned conflicts were further augmented recently by several one-way actions related to the delimitation of East Mediterranean states' economic zones"

1. **The Turkish-Libyan Agreement** which was signed on 27th November 2019, in which Turkey signed with the Libyan Government of National Accord, headed by Faiz Al-Saraj. The agreement outlined an Exclusive Economic Zone (EEZ) between the governments. The delimitation zone is to block the Eastern part of the Mediterranean Sea at a marine segment divided between those two countries. The agreement aroused extensive protest and many international declarations, mostly by Greece, Egypt and Cyprus, which are damaged by the Turkish-Libyan memorandum, whether directly or indirectly. The Turkish move may transform the rule of play within the East Mediterranean marine area, and will, in fact, do so. The move in question is of geostrategic significance in general, and particularly as far as Israel is concerned, and deserves attention.³⁵ As for Israel, being considered an "island state", where more than 99% of the trade is maritime (import and export in terms of weight), this is an unreasonable scenario. The fact that the context for the breakout of two of Israel's wars (Operation "Kadesh" and the "Six Days War") was the question concerning the right for freedom of navigation Tiran Straits and Suez Canal, is not to be overlooked. Thus, for instance, the merchant vessel "Bat Galim" was stopped by the Egyptians at Suez Canal in 1954, ignoring the Convention of Constantinople, which had guaranteed free sailing through the route concerned. The State of Israel should realize the new situation that has formed, view the Turkish move a crucial strategic threat and consider prospective ways of action.
2. **The Palestinian Authority's Declaration of its own economic zone:** Prior the United Nation's General Assembly conference in fall 2019, the Palestinian Authority published its marine zone across from Gaza Strip. The publication

34 Minister Steinitz Confirms: Israel and Lebanon Shall Engage in Direct Contact with American Mediation Concerning the Marine Borders between them, The Ministry of Energy, A Spokesmanship Message, 1 October 2020.
https://www.gov.il/he/departments/news/press_0212020

35 For further discussion, see an article by Chorev Shaul and Benny Shpanier, titled This is the Way in Which Turkey Might Block the Mediterranean Sea for Israel, Ynet, 23 December 2019.
<https://www.ynet.co.il/articles/0,7340,L-5647292,00.html>

included an outline of the territorial waters, the nearby waters and the exclusive economic zone within 200 marine miles (Figure 12). The publication, signed by the Palestinian Authority's Minister of Foreign Affairs, arranged as commonly acceptable within such declarations, the Authority's rights within each zone. It also includes a long list of the exact border points at sea, as well as the zone's map. Apparently, this publication caught both Egypt and Israel off guard. The Egyptians responded with a message to the United Nations' secretariat on 31st December 2019, where they rejected Palestinian Authority's demand, reasoning that the territories declared are under Egyptian control, according to the Convention on the Law of the Sea. The Egyptians further argued that based upon the maritime law, the zone which the Palestinian Authority claims belongs to the Egyptians, a fact ignored by the publication. Furthermore, part of the area in question has already been divided between Egypt and Cyprus, through an official agreement, as acceptable by the international law. Since the Egyptians are a party with the Convention of the Law of the Sea, as are the Palestinians, the former argue that this is the law in force, and should, therefore be implemented.

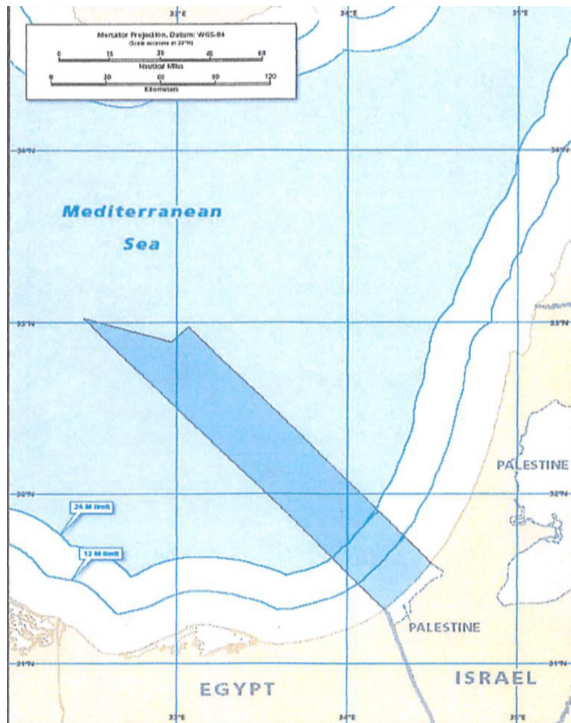


Figure 12: The Palestinian Authority's Declaration of its Economic Waters Zone, September 2019

The response of Israel, which is not a party within the Convention on Law of Sea, as opposed to Egypt and the Palestinian Authority, was delayed by nearly four months, on 14 January 2020. Israel's arguments focus upon the Authority's having no power on hand to declare those zones, since it is not a recognized state entity, according to international law. From the practical viewpoint, this declaration is of no significance, because Israel is the actual dominator of all the waters facing its coasts, including the marine zone facing the Gaza Strip. Hence, in spite of the legal right for which the Palestinian Authority claims, it possesses no practical ability to fulfill the claimed authority.

While Egypt is addressing the issue within the international law's framework, raising legal arguments stating the Convention on the Law of Sea does not permit the Palestinian Authority's move, Israel, which is not a party to the Convention on the Law of Sea, may only raise claims related to lack of power on the Palestinian Authority's part to make the very move. In other words, in this conflict, as well as in other matters perhaps the Israeli and Palestinians do not speak the same language, hence the prospect of resolving the conflict is low.

3. **The Greece-Egypt Agreement:** The Greece-Egypt marine border delimitation, signed on 6th August, constitutes a direct counter-reaction on both states' part, to the marine border delimitation agreement between Turkey and the Libyan Government of National Accord, signed on 27th November 2019.

Marine Piracy and Terror

Marine piracy and terror pose a significant threat to sailing safety, human life and life welfare. Additionally, they may damage the inter-state relationship in terms of exit bases located within a given state's territory. Even while writing this report, marine piracy may well be distinguished from marine terrors in terms of attack's nature, attack methods and the means employed, as well as the areas where marine terror acts and marine piracy occur. Although at present there is resemblance between the action methods of both (damaging vessels, marine luggage theft and hostage taking), their goals are different; terrorist actions are underlain by ideological motives, hence they require publication so as to exert psychological pressure on governments and publics, while piracy uses possessions it has captures and hostages for profit purposes only.

Figure 13 hereunder presents all security events occurring in the Arabian Sea, Horn of Africa, Gulf of Oman and the Red Sea, divided into the following sections; terror events, vessel hijacking, mining etc.³⁶ In contrast, in its report of the first quarter

36 Lydelle Joubert, State of Maritime Piracy 2019, Accessing the Human Cost, *Stable Seas*, July 10, 2020. <https://stableseas.org/publications/state-piracy-2019>

of 2019 the International Maritime Bureau of the Trade Office (IMB) reveals fewer *piracy and armed robbery* events against vessels, compared to the first three months of 2019. In the first quarter of 2019, IMB reported of 38 piracy and armed robbery at sea events, a decline of 28 events, compared to the first quarter of 2018. The report indicates that 27 stowaway episodes occurred; seven vessels experienced shooting episodes, and four cases of attempts to go aboard a vessel and take over were identified. For the first time since the first quarter of 1994, no hijacking of vessel had been reported. The Gulf of Guinea represented a high rate of piracy attacks and armed robbery at sea, with 22 incidents reported during the first quarter of 2019. This is the same area where all global crew kidnapping occurred, of 21 crew members in five different incidents.³⁷

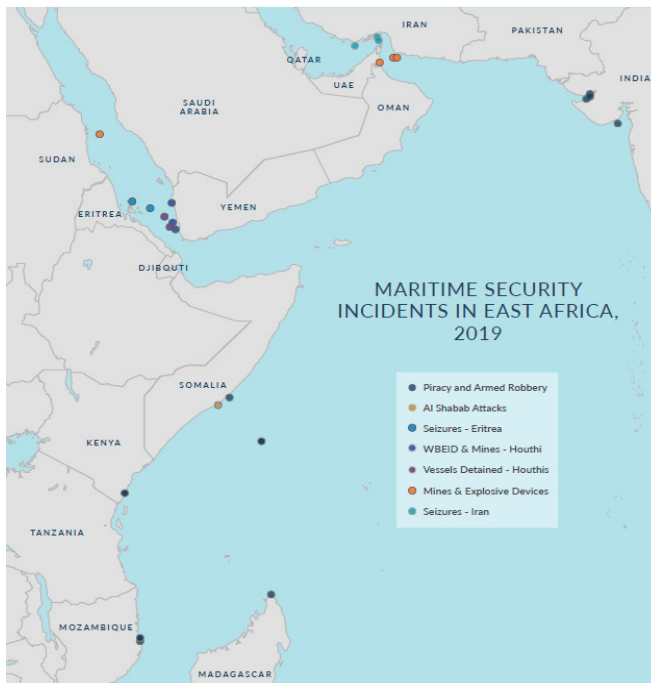


Figure 13: Marine Security Episodes in the Arabian Sea, Horn of Africa, Red Sea and Gulf of Oman in 2019

IMB manager Michael Howlett views combat fleet patrols, security means on board, collaboration, information exchange and information transparency are the key

37 Maritime piracy incidents down in Q1 2019 but kidnapping risk in Gulf of Guinea persists, ICC Commercial Crime Services. <https://iccwbo.org/media-wall/news-speeches/maritime-piracy-incidents-q1-2019-kidnapping-risk-gulf-guinea-persists/> [Accessed September 28, 2020]

factors which facilitate the coping with piracy and armed robbery crimes. However, Howlett adds, "the threat on the crew is still real, whether by violent packs or armed, opportunistic thieves who face the crew".³⁸



Figure 14: All incidents of piracy and armed robbery against vessels in the first quarter of 2019³⁹



Figure 15: Piracy and armed robbery incidents in the first quarter of 2019 – by attack types



Figure 16: Piracy and terror in the first quarter of 2019 – by types of violence toward crew

Because of the extensive activity occurring at the Gulf of Aden and Horn of Africa, initiated by a force acting on behalf of the United Nations, or an independent activity of fleets as the Chinese or the Indian fleets, the data is reassuring. Nonetheless, one case is reported where a Yemenite fishing boat titled "Al-Azham" was hijacked. It served as the mother vessel in that attack on fishing boats on Somalia coasts in April 2019. The joint force acting under the protection of the United Nations (EU NAVFOR) managed to intercept the hijacked fishing boat, arrested the pirates and released the hostages aboard. The hijacking called attention to the fact that the piracy threat outside Somalia had not been wiped out, but merely suppressed.

As for the *economic implications* of piracy and armed robbery, no new data were published in 2018. The 2017 data (Figure 17) suggest an overall economic cost of 1.4 billion dollars, out of which the cost of marine security employment is 292 million

38 ibid

39 IOC – Commercial Crime Service. <https://icc-ccs.org/index/php/1259-imb-piracy-report-2018-attacks-multiply-in-the-gulf-of-guinea>

dollars, and the cost of international forces activity engaging in the matter is 199 million dollars (a decline from 228.3 million dollars cost in the previous year).



Figure 17: The economic cost of piracy and armed robbery in 2017⁴⁰

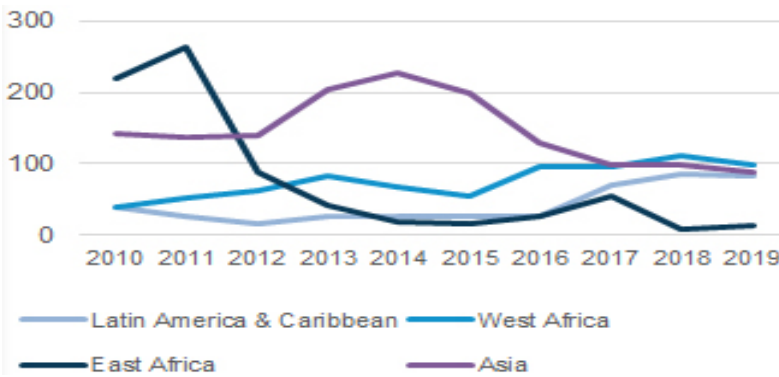


Figure 18: Number of piracy and armed robbery acts on vessels in 2019 by areas⁴¹

Maritime Terrorism

Although there is no consensual definition for terror, one of the common definitions is *"the employment or methodical threat to employ acts of violence by an individual or a group so as to induce fear and to terrorize civil population in order to attain political aspirations or goals"*.⁴²

The years 2018 and 2019 signified a decline in marine terrorism threats by organizations as Al-Qaeda, which was, among other things responsible for damaging the American battleship USS Cole in the Gulf of Aden in 2000.

40 The State of Maritime Piracy 2017, The Assessing of Economic and Human Cost, Ocean Beyond Piracy, Reducing Violence at Sea

41 <https://www.oneearthfuture.org/news/maritime-piracy-report-constantly-evolving-threat>

42 Senia Febrica, *Maritime Security and Indonesia: Cooperation, Interests, and Strategies*, Oxon, Routledge, 1st edition: 2017, p.26

At the time, Iran managed to expand its influence in Yemen, strengthening the Houthi movement as a threat on the state's local stability, as well as on the sailing routes near Yemen coasts. Iran was extensively assisted by the Houthis, who served as proxies, a position which allowed the former not to assume direct responsibility for the organization's terroristic activity. In the 2019 report, we covered some of the Houthi activities in the Red Sea, including damaging Saudi vessels, both battleships and civil vessels.⁴³

Iran has threatened since the moment of revealing its nuclear plan to damage the petroleum transportation from the Persian Gulf in case of attack on its nuclear facilities, or later on, when the United States withdraws, in 2018, from the nuclear agreement, by imposing further sanctions on Iran. The reason for the "tanker war" breakout in May 2019 in the Persian Gulf was, as remembered, the arrest of the Iranian tanker "Stena Impero" in Gibraltar by the British, while it was transporting petroleum to Syria, disobeying the European Union sanctions.

Since the Iranian attacks, American strike forces have occasionally conducted operations for the sake of *freedom of navigation assurance in the Straits of Hormuz and Gulf of Oman*. As of September 2020, a task force consisting of the USS Nimitz (CVN-68) conducted an operational patrol and a passage through the Strait of Hormuz (Transit Passage). The force which operated under the command of the fifth fleet, also included the guided missiles battle cruiser USS Princeton, and the guided missiles battleship USS Sterett, which, additionally to the passage through the Strait of Hormuz also conducted marine drills with regional partners. The Strait of Hormuz passage draws the American vessels to the Iranian area and the threats on the part of the IRGCN navy. The force's activity relied upon the port facilities of the fifth fleet, located in Bahrain.⁴⁴

In the time periods in-between operations of a task force passage through the Straits of Hormuz, the American navy has maintained regular presence outside the Persian Gulf, the Northern Arabian Sea and the Gulf of Oman since May 2019, when the aircraft Lincoln was called to the region, so as to facilitate a quick American response against Iran.

43 Maritime Terrorism: A Rising Threat from Al-Qaeda and Iranian Proxies, *European Eye on Radicalization*, May 14, 2019. <https://eeradicalization.com/maritime-terrorism-a-rising-threat-from-al-qaeda-and-iranian-proxies-2>

44 Sam LaGrone, USS Nimitz Now Operating in the Persian Gulf, USNI, September 18, 2020. <https://news.usni.org/2020/09/18/uss-nimitz-now-operating-in-the-persian-gulf>

The purpose underlying Iran's attack of tankers or establish such a threat, is to induce security-related tension in the Persian Gulf and near (the western part of the Indian Ocean), which is geared at raising the transportation costs for key petroleum consumer and to exert international pressure on the United States.

Out of concern lest maritime terror's leaking to the Horn of Africa and Bab-Al-Mandav Strait, the Inter-Governmental Standing Committee on Shipping requested the vessels of the European Union fleet expand their activity to the Horn of Africa, so as to cope with all types of maritime crime in the Indian Ocean, including terrorism, drug smuggling and human trafficking.⁴⁵

To sum up, the maritime terrorism has evolved its nature and become a weapon in the hands of Iran as part of its policy against the United States and other western countries, including against various regimes in the region, as Yemen's and Saudi Arabia's regime. The scope of this terrorism depends upon the progress toward problem resolution in the political aspect, or, alternatively, to its worsening. The military solution may facilitate maintaining a low degree of terroristic activity, but not completely eliminate it.

Immigration through Marine Routes

Refugee immigration to Europe through the Mediterranean Sea is not a phenomenon new to this decade. It has taken lives of many thousands of refugees, in their attempt to cross the Mediterranean Sea and reach Europe. However, the refugee movement has substantially intensified in the past decade because of the *refugees of the civil wars in Syria, and African refugees coming from Sub-Sahara countries to Europe, through the coasts of Libya*.

Following the steps taken on the matter by the European Union countries, the flow of refugees arriving through marine routes appears to subside. Overall number of refugees who made their way to Europe in 2020 (as of September 2020) was 55529 people, while in 2019, the number of refugees was 123,663, and 141,472 in 2018. The refugees who arrived to Europe through marine routes by September 2020 (Greece, Italy, Spain, Cyprus and Malta) numbered 51'039, while 4,490 arrived through continental routes. Due to drowning or for another reason, 495 refugees died; in 2019 – 2,277 and 2,277 in 2018. It should be borne in mind that Turkey holds in its territory more than three million refugees of the Syrian civil wars, which

45 Operation ATALANTA flagship ESPS SANTA MARIA and JS OHNAMI met at sea to conduct a PASSEX in the Gulf of Aden, September 21, 2020. <https://eunavfor.eu/operation-atalanta-flagship-esps-santa-maria-and-js-ohnami-met-at-sea-to-conduct-a-passex-in-the-gulf-of-aden>

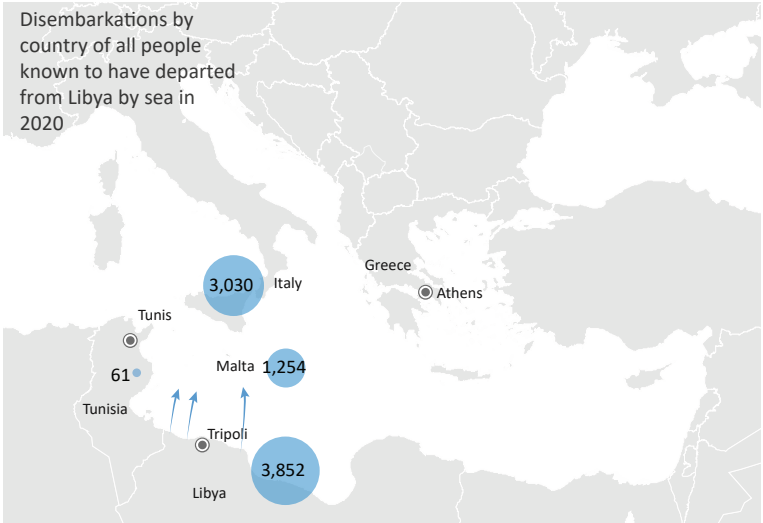
were suspected of intentions to continue their journey to Europe. In 2015, the European Union reached an agreement with Turkey in return to a three billion euros payment, and an obligation to renew the European Union membership proposal, in return to assistance in the prevention of refugee fleeing in an attempt to make their way to Europe. The deal, which was agreed in a special European Union summit in Brussels with Turkish prime minister Ahmet Davutoğlu, is a key part of the immigration crisis management.⁴⁶ However, in a criticism expressed against Turkish president in October 2019 regarding the entrance of his army to the Kurdish enclave in Syria, Turkish president Recep Tayyip Erdoğan threatened to reopen the routes to immigrants to Europe. That was not his first threat, and it was a response to the global criticism concerning his military operation in the northern part of Syria.⁴⁷ This incident implies the fragility of handling the refugee crisis and the cynical use thereof by politicians.

Upon the global recruitment to the struggle against the Coronavirus, many countries in Europe in outside have employed unusual means for their border control, restricting flights and continental movement in their border passages. UNHCR and United Nations' refugee agency called European countries to maintain compassionate work methods, and to multiply their efforts to strengthen the shelter systems in Europe during those rough times. The agency calls European countries to amplify coordination, solidarity and division of responsibility, viewing the movement of refugees and immigrants through the Mediterranean Sea, growing more intense. The refugee agency declared that in spite of the most difficult circumstances faced by many countries due to the Corona pandemic, the protection of life and basic human rights must remain the guiding star within their decision making, emphasizing that marine search and rescue are both a humanitarian duty and a duty dictated by the international law.⁴⁸

46 Leo Cendrowicz, Refugee crisis: EU pays €3bn to Turkey in exchange for help on dealing with European migration, *Independent*, November 29, 2015. <https://www.independent.co.uk/news/world/europe/refugee-crisis-eu-pays-3bn-to-turkey-in-exchange-for-help-on-dealing-with-european-migration-a6753861.html> [Accessed October 5, 2020]

47 Erdogan threatens to flood Europe with 3.6 million refugees if EU calls Syria operation an 'invasion', *Wn.Co*, October 10, 2019. https://article.worldnews.com/view/2019/10/10/Erdogan_threatens_to_flood_Europe_with_36_million_refugees_i

48 News comment on search and rescue in the Central Mediterranean by Gillian Triggs, Assistant High Commissioner for Protection at UNHCR, the UN Refugee Agency, *the UN Refugee Agency*, 1 May 2020. <https://www.unhcr.org/news/press/2020/5eac53214/news-comment-search-rescue-central-mediterranean-gillian-triggs-assistant.html>



Includes Serbia and Kosovo (S/RES/1244 [1999]). The boundaries and names shown, and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Figure 19: The number of refugees who left Libya on their way to Europe through marine passages in the first quarter of 2020⁴⁹

Departures from Libya by sea since 2017 (January to May 2020)

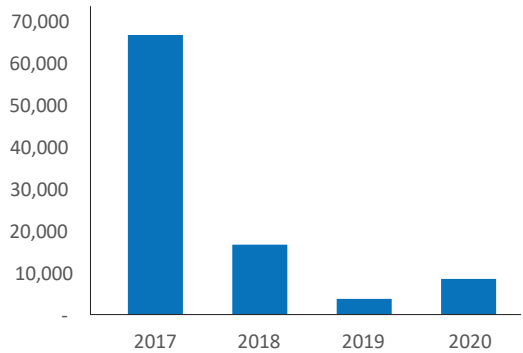


Figure 20: The number of refugees leaving the coasts of Libya through marine passages in 2017-2020⁵⁰

The UNHCR recommended that as for the refugees who managed to leave the coasts of Libya through sea enhancing search and rescue capacity at the central

49 UNHCR, Arrivals to Europe from Libya – May 2020, Regional Bureau for Europe. <https://data2.unhcr.org/en/documents/details/77525> [Accessed September 28, 2020]

50 ibid

Mediterranean, because of the multitude of drowning cases, imploring the patrol forces not to send the captured persons to Libya, which is not a safe place for alighting passengers to the coast.⁵¹ There is doubt as for the responsiveness of the marine forces operating in the region to accept this recommendation.

In light of this situation, the European Union considers the idea of establishing immigrant absorption and screening centers in North Africa, attempting to deter people from going on life-endangering journeys to Europe, through the Mediterranean.

It is important to remember that ceasing the flow of refugees from Libya to the southern Europe countries became apparent after Italy began training the coast guard force of the Libyan Government of National Accord in 2017, and finance its activity. Those forces are train to intercept refugees and stop them even prior to going onto sea, or near the Libyan coasts. In late July, the killing of three youngster was document, after they were intercepted at sea by the Libyan coast guard, whose operation is financed by the European Union. This incident shed light on the fate of ten thousands of immigrants and shelter seekers who returned to Libya to cope with arrest, abuse and torture by the smugglers. The are part of more than 6,200 men, women and children who were intercepted at the central Mediterranean and returned to Libya in 2020. Since 2017, the number of migrants and refugees is around 40,000, and perhaps even more.⁵²

Warfare within the Cybernetic Sphere

The importance of warfare within the cybernetic sphere (both defense and offense) is growing and becoming more intense over time. This is manifested by the development of relevant technological capacities by the various states, and a more frequent employment f those capacities. The maritime sphere and the operation conducted therein are sensitive to this type of warfare, since it is global, border-crossing and demands a high degree of connectivity. Cyber security events occurring within marine infrastructures, such as sea ports of international significance may affect many, broad sectors in the marine trade and transportation activity.

The Iranian port cyber attack in May 2020, which was attributed to Israel by the "Washington Post", and Iran's difficulty to swiftly recover from this attack,

51 ibid

52 Mat Nashed, what happens to forcibly returned to Libya? The Humanitarian, August 5, 2020. <https://thenewhumanitarian.org/news-feature/2020/08/05/missing-migrants-Libya-forced-returns-Mediterranean>

demonstrate the significance of highly severe damage within the cybernetic sphere through an activity which does not lead the parties to a broad military conflict, but causes the victim severe damages.⁵³

Viewing the matter's importance, the Center for Maritime Policy and Strategy published on its home page two articles on the matter; an article by Itay Sela and Ido Ben Moshe, titled "Cyber Threats on the Port Front" and an article by Ofir Kafri and Dr. Carmela Lutmer, titled "International Collaborations in Cyber Security within the Marine Sphere".

53 Washington Post: Israel linked to cyberattack on Iranian port, Reuters, Tuesday, May 19, 2020. <https://www.chinadailyasia.com/article/130959>