

MARITIME STRATEGIC EVALUATION FOR ISRAEL 2022/23

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Section 3: Political Aspects in the Eastern Mediterranean

The three articles in this section discuss Middle Eastern affairs. The first discusses the maritime boundary agreement between Israel and Lebanon, analyzes the negotiations over the preceding decade, and highlights its achievements and the challenges that it poses to Israel. The other two articles discuss Turkey. The first concerns changes in Turkish foreign policy in 2022, including the renewal of relations with Israel and the continued conflict with Greece and Cyprus over maritime boundaries, all this in the context of the restoration of Turkey's important geopolitical position for the United States and the West, through the closure of the Turkish straits to military vessels since the outbreak of the Russo-Ukrainian war. The second article about Turkey is a guest essay courtesy of TESPAM, a Turkish research institute, which presents their position on the centrality of Turkey in the European energy market, especially in light of the desire of European Union nations to disconnect from Russia as their primary energy provider. The article proposes Turkish-Israeli cooperation as a possible corridor for the transfer of natural gas to Europe, if only as a partial solution to Europe's energy needs.

The Delimitation Agreement Between Israel and Lebanon – Challenges and Achievements

Benny Spanier and Orin Shefler

On October 27, 2022, the Government of Israel approved an agreement for the permanent delimitation of a maritime boundary line ("MBL") between Israel and Lebanon and immediately thereafter, at the U.N. base in Naqoura, representatives of both Israel and Lebanon signed the necessary declarations to officially approve the agreement. The negotiations leading to this agreement were mediated and facilitated by the United States. The consequential maritime picture resulting from the signing of the agreement remains complicated but the signing of the agreement was an opportunity seized within a very limited timeframe following lengthy diplomatic negotiations between two "enemy states" under the mediation and facilitation of the United States.

The agreement ultimately determines four maritime coordinates (or points) through which the new Israeli-Lebanese MBL passes. The agreement adopts a very pragmatic and practical approach, which will allow for the future development of the Sidon (Qana) offshore hydrocarbon prospect (a.k.a. "Block 9 Prospect") which straddles the agreed MBL between the two sides.

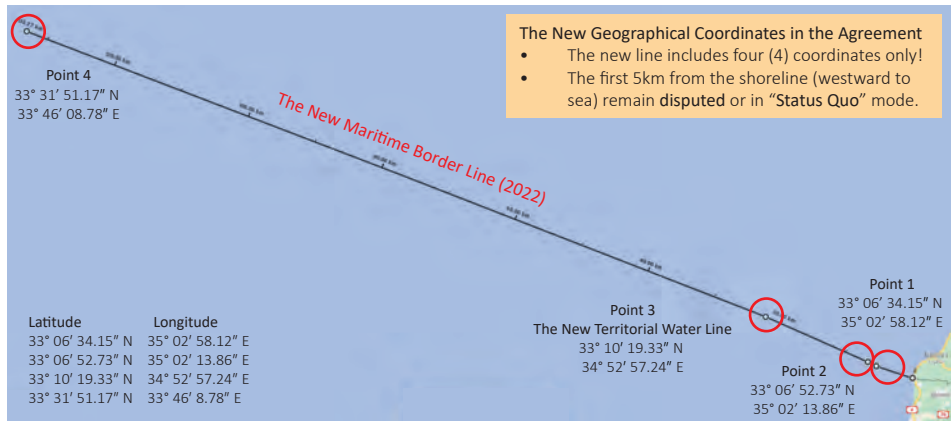


Fig. 1: The MBL between Israel and Lebanon comprising four points (in red circles)

It is the nature of negotiations that each side makes gains but must also make compromises. This article sets out to examine the agreement from an Israeli perspective as it pertained at the time of writing (November 2022) and looking ahead; it does not purport to examine the conduct of the negotiations over the years.

First, we shall review in general terms the main events during the years of negotiations leading to the agreement; then, we shall analyze the terms of the agreement with an eye on territory and resources, and we shall note the achievements and challenges as we understand them. Finally, we shall present several forward-looking conclusions arising out of the agreement, which the State of Israel would do well to explore.

Before developing the matters at hand, we recall that in the year 2019, the Maritime Policy & Strategy Research Center at the University of Haifa ("HMS") published a monograph titled *By Peaceful Means – An Examination of the Conflict over the Maritime Boundary between Israel and Lebanon from the Perspective of Maritime Law*.¹ Now that the agreement has been signed, we believe that it delivers clear achievements to both sides in terms of regional and energy security and that it will contribute greatly to the stability of the regional maritime domain.

Historical Background: A Chronology of Negotiations

Israel and Lebanon do not have a peace treaty between them and have never agreed on an international border, either on land or at sea.² Over the years, the two states have commonly referred to the British-French land border line from 1923 as their land boundary ("LBL"). The aforementioned British-French LBL was negotiated between Britain (which controlled Palestine at that time) and France (which controlled Syria and Lebanon at that time) and was intended to represent the LBL on which the ultimate international border between Israel and Lebanon would be based when the time came.³

¹ Benny Spanier, *By Peaceful Means – An Examination of the Conflict over the Maritime Boundary between Israel and Lebanon from the Perspective of Maritime Law* (Haifa: Maritime Policy & Strategy Research Center, University of Haifa, 2019) [Hebrew].

² Haim Srebro, *Israel's Borders Today* (Tel Aviv: Survey of Israel, 2012), 72 [Hebrew]; Amos Harel, "[Thirteen Israeli Border Points Raising Tensions with Lebanon](#)," *Haaretz*, February 27, 2018.

³ Gideon Biger, "Geographical and Political Issues in the Process of Determining the Northern Border of Eretz-Israel during the Mandate Period," in Avshalom Shmuely, Arnon Sofer and Nurit Kliot (eds.), *Land of the Galilee* (Haifa: The Society for Applied Research, University of Haifa, 1983), 427 [Hebrew]. The demarcation of the northern border of the Land of Israel began with the separation of the areas that would be overseen by France and Britain, respectively, according to the 1916 Sykes-Picot Agreement. The demarcation process continued with negotiations, which concluded in December 1920. Specific agreements were subsequently reached to ease local conditions in 1923–1928. Giora Eiland, *No Sleep at Night: A Biography* (Rishon LeZion: Yediote Books, 2018), p. 230 [Hebrew]. Moshe Brawer, *The Northern Border of Eretz-Israel and its Demarcation during the Mandate Era* (Haifa: [no publisher], 1970), pp. 3–6 [Hebrew].

Reliance on the British-French LBL was also the case in each of (a) the 1949 Armistice Agreements,⁴ (b) the Mixed Armistice Commission activities (MAC), (c) the May 17, 1982 Agreement between Israel and Lebanon, and (d) the discussions with the United Nations ahead of the demarcation of the "Blue Line" in the year 2000 pursuant to the Israel Defense Forces ("IDF") withdrawal from the self-declared security zone in southern Lebanon.⁵ The current LBL was drawn in the year 2000 by the United Nations for the purpose of the IDF withdrawal, whereby the United Nations cartographical officials based the line on the Mandate-era British-French LBL from 1923.⁶ Since Israel, Lebanon, the United Nations, and the international community have all given their agreement in principle to the route of the current Israel-Lebanon LBL, we may see this as a positive basis for an agreed land border line when peace is finally made between the sides, with minor adjustments to be agreed between the parties.

To date, there remain only thirteen points of contention between Israel and Lebanon on their LBL, the most relevant of which for the purpose of the MBL and the maritime delimitation agreement is the location of the westernmost point located on the coast at the Rosh Hanikra location,⁷ which incidentally is also the starting point for the MBL, westward into the sea. This land point at Rosh Hanikra was not agreed upon as part of the Mandate-era British-French LBL and has never been agreed between the parties.⁸

When the IDF withdrew its forces from the Security Zone in southern Lebanon in the year 2000, it had to determine for itself a suitable MBL for the purpose of preventing hostile activity from the sea against Israel, and in order to mark a "no-go-area" for Lebanese fishermen along their southern MBL. During this process, the MBL marking

⁴ [Israeli-Lebanese General Armistice Agreement](#), signed on March 23, 1949.

⁵ Srebro, *Israel's Borders Today* [Hebrew].

⁶ Ibid, p. 71. For more see: Chilik Horowitz and Yisrael Loger, [Department of Mandate Measurements and Borders of Eretz-Israel](#), Survey of Israel Center, on the Survey of Israel website [Hebrew]

⁷ Harel, "Thirteen Israeli Border Points Raising Tensions with Lebanon."

⁸ Brawer, *The Northern Border of Eretz-Israel and its Demarcation during the Mandate Era*, p. 7 [Hebrew]. The British representatives were able in the negotiations to shift the border northward and position it at the southern opening of the Ladder of Tyre. Had the border commission remained faithful to the instructions in the agreement from 1920, the border would have hit the sea at least 1km south of its present location. Biger, "Geographical and Political Issues in the Process of Determining the Northern Border of Eretz-Israel during the Mandate Period," p. 440 [Hebrew]. The Rosh Hanikra area was not considered significant at the time. In the negotiations between the sides, the emphasis was placed on geographic and settlement considerations, most importantly farmland, water sources, grazing lands, roads, agricultural development, etc. For this reason, the point was moved and was not precisely demarcated. Srebro, *Israel's Borders Today*, p. 71 [Hebrew].

Israel's territorial waters was also defined, solely for security needs provided for by the Israeli Navy; this was referred to as the buoy line (since it was marked with buoys).

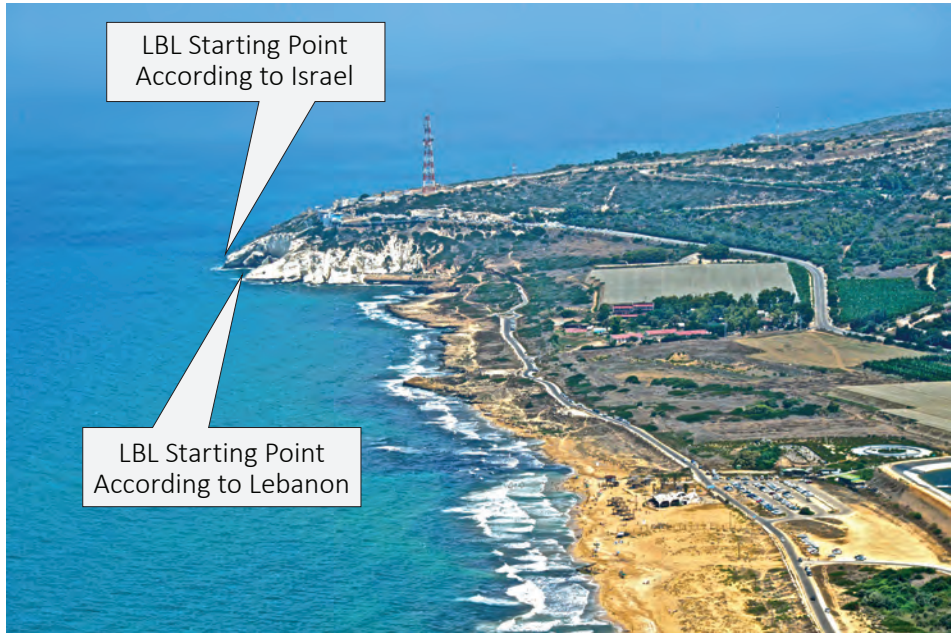


Fig. 2: The present dispute over the starting point of the MBL⁹

In time, and with the discovery of Israel's offshore gas reserves in the Mediterranean Sea during the first decade of the 2000s, the MBL was extended slightly to carve out Israel's exclusive economic zone ("EEZ"). It bears noting that from Israel's perspective, the considerations for defining the Israel-Lebanon MBL were primarily reactive and in response to evolving events, namely the IDF's withdrawal from Lebanon and the need to defend Israel's offshore gas reserves. The State of Israel did not engage in any long-term strategic or geopolitical thinking about the many implications of the MBL at the time.¹⁰

In order to establish its EEZ, Israel chose to initially rely on two existing bilateral maritime agreements which were previously signed between Cyprus and its neighbors. (These agreements were signed before Israel signed its own maritime agreement with Cyprus.) Cyprus signed these aforementioned agreements with Egypt and Lebanon respectively, but they also had the effect of defining Israel's EEZ in themselves.

⁹ Image: Yigal Dekel, 2013. *Spanier, By Peaceful Means* [Hebrew].

¹⁰ [Protocol 127 of the Knesset Foreign Affairs and Defense Committee](#), October 19, 2022, 3 [Hebrew].

The first agreement, namely between Cyprus and Egypt, defined their mutual MBL and respective EEZs and was signed on February 17, 2003. It entered into effect on March 7, 2004.¹¹

Thereafter, the second agreement, a separate Cypriot-Lebanese maritime agreement, was signed in January 2007; in it, Cyprus and Lebanon agreed on their mutual MBL and their respective EEZs. This Cypriot-Lebanese maritime agreement was ratified by Cyprus, but not by Lebanon – and has therefore not been deposited with the United Nations.¹²

On December 20, 2010, Israel and Cyprus finally signed a maritime agreement delimiting their MBL and defining their respective EEZs.¹³ The preamble to the Israel-Cyprus agreement states that they have delimited their exclusive economic zones in pursuance with the United Nations Convention on the Law of the Sea (UNCLOS).¹⁴

On its western flank, the Israel-Cyprus MBL follows the median line principle between Israel and Cyprus (fig. 3).¹⁵ On its northern flank, the area is delimited by point 1, which is the southernmost point in the unratified Cypriot-Lebanese maritime agreement and is also the northernmost point in the Israeli-Cypriot agreement.¹⁶

The latter Israeli-Cypriot agreement contains a reservation stating that point 1 is non-binding and open to future negotiations between the states.¹⁷ Moreover, paragraph 3 in

¹¹ [Agreement between the Republic of Cyprus and the Arab Republic of Egypt on the delimitation of the Exclusive Economic Zone](#), signed in Nicosia on 17 December 2010 (entry into force: 25 February 2011). Available on the U.N. website. Haim Srebro, "The Border of Money," *Ma'arachot* 461 (2015), 8. On the requirement to deposit a ratified treaty with the United Nations, see: United Nations Convention on the Law of the Sea of 10 December 1982, 1833 U.N.T.S.3. Para. 75(2): "The coastal State shall give due publicity to such charts or lists of geographical coordinates and shall deposit a copy of each such chart or list with the Secretary-General of the United Nations."

¹² Haim Srebro, "The delimitation of the Exclusive Economic Zone (EEZ) between Israel and Cyprus," *Horizons in Geography* 88 (2016), pp. 47-48 [Hebrew].

¹³ Israel-Cyprus agreement.

¹⁴ *Ibid*, preamble.

¹⁵ *Ibid*, 1(c); UNCLOS 74(1): "The delimitation of the exclusive economic zone between States with opposite or adjacent coasts shall be effected by agreement on the basis of international law, as referred to in Article 38 of the Statute of the International Court of Justice, in order to achieve an equitable solution."

¹⁶ Nadia Tzimerman, "The Dispute over the Israel-Lebanon Maritime Border—Legal Perspectives" in Shaul Chorev and Ehud Gonen (eds.), *Maritime Strategic Evaluation for Israel 2017/18* (Haifa: Maritime Policy & Strategy Research Center, University of Haifa, 2018), pp. 139-146; Srebro, *Israel's Borders Today*, 68 [Hebrew].

¹⁷ Srebro, "The Border of Money," p. 10 [Hebrew].

the Israeli-Cypriot agreement states that if either state (Israel or Cyprus) should decide to conduct negotiations with a third-state about that third-state's EEZ (such as Lebanon, for example), it would have to consult the other state before reaching an agreement and check whether it was delimited with reference to points 1 and 12.

As early as July 9, 2010, and October 11, 2010, before the signing of the Israel-Cyprus agreement, Lebanon deposited a statement with the United Nations Secretariat listing the maritime border coordinates of the southern MBL of its EEZ in accordance with paragraph 75(2) of UNCLOS, which requires states to publicize this information through the United Nations.¹⁸ The Lebanese MBL extended from point 18, adjacent to Lebanon's coastline, to point 23 located in the middle of the eastern Mediterranean Sea, thus creating the line referred to as line 23.

Later, on June 20, 2011, Lebanon once again deposited letters with the U.N. Secretariat stipulating that the Israeli-Lebanese MBL passes between point B1 on the Rosh Hanikra coastal shore and point 23, which in its view was the midpoint equidistant between the three countries (i.e., Israel, Cyprus and Lebanon).¹⁹ Point 23 lies ten miles southwest of point 1 (fig. 4). In its letters to the United Nations, Lebanon clarified that point 1 was valid only in relation to the agreement demarcating the boundary between the Lebanese and Cypriot EEZs and did not constitute an MBL between Israel and Lebanon.²⁰ In the letter, Lebanon objected to the manner in which Israel and Cyprus had made use of point 1, which is identical to the southwestern tip in its agreement with Cyprus, for the purpose of delimiting an MBL between Israel and Lebanon.

¹⁸ Deposit by Lebanon of Charts and List of Geographical Coordinates of Points Pursuant to Article 75, Paragraph 2 of the Convention. Available on the [UN depository of submitted documents by Lebanon](#). Note that we are not speaking about the depositing of the agreement with Cyprus, only a unilateral definition of Lebanon's southern border.

¹⁹ Ibid, letter dated June 20, 2011, recalling that Lebanon already deposited its boundary line in 2010: "I write to you with regard to the exclusive economic zone of Lebanon. On 9 July 2010 and 11 October 2010, Lebanon deposited with the United Nations the geographical coordinates of, respectively, the southern and southwestern maritime borders of that zone. The southern maritime border extends from point B1 on the shore at Ra's Naqurah, the first point on the 1949 Israeli-Lebanese General Armistice Agreement table of coordinates, to point 23, that is equidistant between the three countries concerned, and on the coordinates of which all must agree. The geographical coordinates of point 23 are latitude 33°31' 51.17", longitude 33°46' 08.78". Point 1 does not therefore represent the southern end of the median between the Lebanese Republic and the Republic of Cyprus that separates the exclusive economic zones of each country, and can only be viewed as a point that is shared by Lebanon and Cyprus. It is not a terminal point and therefore may not be taken as a starting point between Cyprus and any other country, particularly given the fact that it is just one point like any of the others on this line."

²⁰ Ibid.

On July 12, 2011, the Israeli Mission to the United Nations sent the U.N. Secretariat a list of six maritime coordinates delimiting Israel's northern MBL as determined by the Government of Israel by the applicable government decision made on July 6, 2011.

Point 1 on the Israeli MBL is the point that appears in the agreement between Israel and Cyprus on the delimitation of their mutual EEZs, and which is the same as point 1 in the maritime agreement between Lebanon and Cyprus.²¹

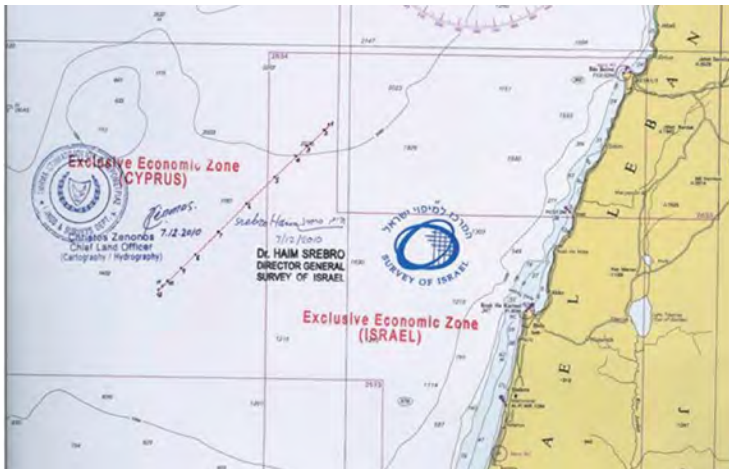


Fig. 3: Map delimitating the Israeli and Cypriot MBL and EEZs, with twelve points²²

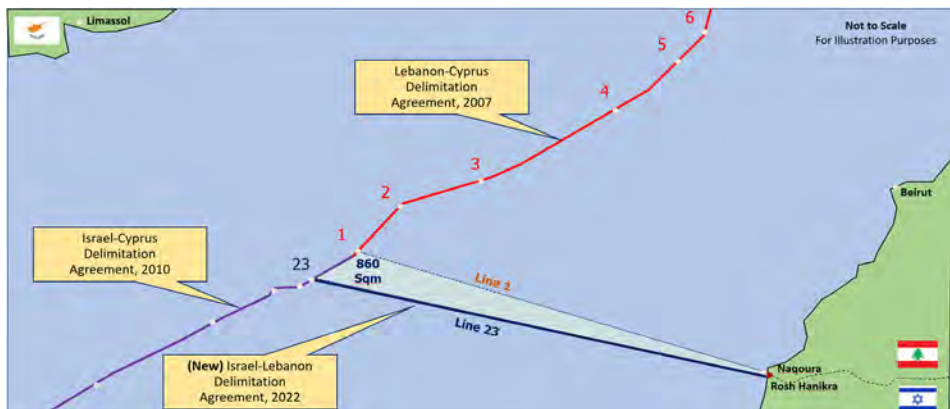


Fig. 4: Map of the disputed triangle between Israel (Line 1) and Lebanon (Line 23)

²¹ [List of Geographical Coordinates for the Northern Limit of the Territorial and Exclusive Economic Zone of the State of Israel.](#)

²² Source: Annex 2 of the Israeli-Cypriot agreement

In early 2011, Lebanon asked the U.K. Hydrographic Office (UKHO) to conduct research on its behalf and to produce recommendations about the correct MBL on the southern border with Israel. On August 17, 2011, the UKHO submitted its work to Lebanon and among its observations was that point 23 was based on a hydrographic and legal error; it recommended two alternative lines, one of which leads to point 29, south of 23.



Fig. 5: Map of line 29 with reference to lines 1 and 23 (including the expected location of the Karish and Sidon/Qana fields)

In Lebanon’s response to Israel’s unilateral declaration of its northern MBL (i.e. Line 1), the route of which is located at northernmost part of Israel’s EEZ, Lebanon chose not to submit as a countermeasure the UKHO’s position to the United Nations; and as such, on September 3, 2011, Lebanon eventually chose to submit to the United Nations the coordinates of line 23 as its official position on the matter of the Israel-Lebanon MBL.²³ Officially, the Government of Lebanon has never actually presented to the United Nations an official position in reliance on the UKHO’s proposal for line 29, but neither had Lebanon ever forgone this option—that is, of course, until the signing of the current delimitation agreement between Israel and Lebanon. As such, ultimately, Lebanon’s submission of line 23 to the United Nations created a disputed triangle between line 1 and line 23, encompassing 860 km² (332 square miles) at sea (see fig. 6), over which the parties were required to negotiate.

²³ Letter dated September 3, which stated, *inter alia*: "I am writing to you with regard to the claims deposited on 12 July 2011 by the Israeli mission concerning the geographical coordinates of the northern part of the territorial waters and exclusive economic zone that it alleges belong to Israel."

At this stage, in 2011, the United States took a mediation and facilitation role in the conflict at Israel's request, and with Lebanon's consent. In 2012, U.S. special envoy Frederic Hof proposed dividing the triangular area of dispute, and at the end of this round of discussions, the sides had almost reached certain agreements that would divide the triangular area such that Lebanon would receive 56 percent of it and Israel would receive the rest. It was also decided at that point in time to begin the MBL from a point three miles out at sea and not from the coastline in order not to touch the point of contention on the shore at Rosh Hanikra. Regrettably, these talks did not bear fruit and the special envoy was subsequently replaced, to no avail.²⁴

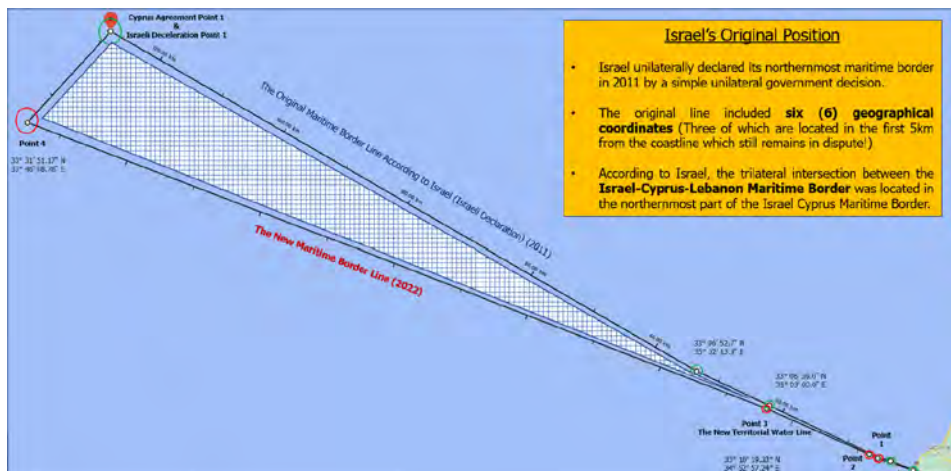


Fig. 6: The disputed triangle—860 km² (332 square miles); line 1 vs. line 23

In October 2020, five meetings were held between Israeli and Lebanese teams at the United Nations base at Naqoura. In the framework of these indirect talks, which were again mediated and facilitated by the United States and the United Nations, an attempt was made to reach an agreement in the dispute over the location of the MBL between the two states. These negotiations failed once again and were not subsequently resumed. It appears that during this round of talks, the Lebanese delegation first presented to the sides the principles of line 29 and claimed that line 23 was actually incorrect—all in reliance on the UKHO's recommendations to the Government of Lebanon.²⁵

²⁴ Frederic C. Hof, "[Maritime Mediation Between Lebanon and Israel](#)," *New Lines Magazine*, December 4, 2020.

²⁵ Benny Spanier, *Changes in Lebanon's Position in the Maritime Boundary Conflict with Israel in October 2020—A Critical Examination* (Haifa: Maritime Policy & Strategy Research Center, University of Haifa, 2021), pp. 2, 7–8 [Hebrew].

On August 10, 2021, U.S. Secretary of State Antony Blinken announced the appointment of Amos Hochstein as the new U.S. special envoy and coordinator for international energy affairs. It was decided that he would address the MBL conflict between Israel and Lebanon. He immediately launched his mediation and facilitation efforts, and from media reports, it appears that this time, the intention was to address the issues of territory and resources together as one.

Due to severe time constraints dictated by the end of the Lebanese president's tenure in October 2022 and the upcoming elections in Israel, which would be held on November 1, 2022, the negotiations became especially intensive. Indeed, on October 12, 2022, the Government of Israel ultimately approved the delimitation agreement between Israel and Lebanon and submitted the agreement to the Knesset for review until its ratification by the Government on October 27, 2022. In the meanwhile, the Israeli Supreme Court rejected several petitions against the nature of the approval process carried out by the Government of Israel.

On October 19, 2022, the Foreign Affairs and Defense Committee at the Knesset held a deliberation about the delimitation agreement between Israel and Lebanon during the time that the agreement was submitted by the Government for the Knesset's review. We note that at this deliberation, the Israeli national security advisor, the director-general of the Ministry of Foreign Affairs, and the director-general of the Ministry of Energy each explained the principles of the agreement to the committee and described the manner in which it was achieved and its implications. Their remarks at that meeting shed light on the negotiation process and the achievements, as they saw them at the time.²⁶

The national security advisor noted the instructions that the Government had given the negotiation team during the process, namely: (a) to fully safeguard the State of Israel's security interests by delimitating an agreed international MBL; (b) to create a strategic equilibrium based on the principle of "Platform vs. Platform" (i.e. a balance of interests whereby Israel could position offshore infrastructure on its side of the MBL, and Lebanon could do the same on its side, such that there remained a symmetry of security interests, which could act to deter attacks on this infrastructure by either side, in a way that would prevent any deterioration into an unwanted escalation or a reality of routine frictions); and (c) to guarantee the security of Israel's national energy infrastructure and the continuity of its energy supply. In other words, there was to be no interference with gas extraction from the Karish gas field located in the vicinity of the Block 9 Prospect, which straddles the Israeli-Lebanon MBL.²⁷ The director-general of the Ministry of Foreign Affairs also

²⁶ Protocol 127 of the Knesset Foreign Affairs and Defense Committee, 3–17 [Hebrew].

²⁷ Protocol 127 of the Knesset Foreign Affairs and Defense Committee, 7, 36 [Hebrew].

noted the importance of the establishment of an agreed international maritime border line with an enemy state.²⁸

Achievements and Challenges in the Agreement – The Israeli Perspective

Delimitation of an MBL between Israel and Lebanon

The agreement comprises four sections and four annexes. The first section of the agreement delaminates the MBL by identifying four maritime coordinates (or points), each of which was formally submitted to the United States and the U.N. Secretary General by both sides.

The agreement detaches the question of the MBL from that of the starting point of the LBL at Rosh Hanikra for the purpose of the agreement alone without any prejudice to the sides' legal claims on this matter.

The route of the Israeli-Lebanese MBL is based on two elements: (a) the route of the "buoy line" (i.e., the line drawn from the land point at Rosh Hanikra to the first coordinate of the MBL, westward (see fig. 7), and (b) the route of the MBL, marked by four maritime coordinates (points), which begins at the end of the buoy line and extends all the way to point 23 at the western flank of each side's EEZs (see figs. 1, 5, and 6).²⁹

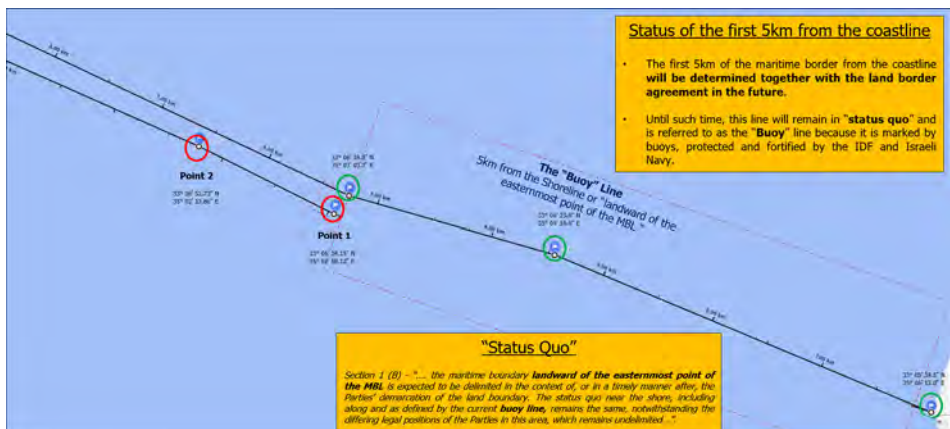


Fig. 7: Map of the "Buoy Line"

²⁸ Protocol 127 of the Knesset Foreign Affairs and Defense Committee, 46 [Hebrew].

²⁹ Israeli-Lebanese delimitation agreement, Section 1(1–4).

Achievements

The MBL serves Israel's security interests as defined by the Government of Israel and other state authorities including the National Security Council, the Israel Defense Forces, and the Israeli Navy. This is the first time that Israel has signed a MBL agreement with an enemy state, despite this not being a peace treaty between the sides. The agreement stipulates that the MBL establishes "a permanent and equitable resolution of their maritime dispute."³⁰ The maritime coordinate points of the MBL have been deposited with the United Nations and secure international validity for the agreement.

The MBL effectively terminates Lebanon's claims to any maritime territory or resources in Israel's EEZ and as such, also waives its claim to point 29 as made according to the UKHO recommendations.

Challenges

The MBL leaves untouched the dispute with Lebanon about the buoy line, stating that "the Parties agree that the status quo near the shore, including along and as defined by the current buoy line, remains the same, notwithstanding the differing legal positions of the Parties in this area, which remains undelimited." This issue must still be determined in the future by agreement of both sides concerning the starting point of the LBL from the shore starting at Rosh Hanikra. Not only that, but the agreement stipulates that the maritime coordinates (points) deposited with the United Nations supersede any of the sides' previously deposited coordinates with the United Nations for the purpose of their MBLs. However, on the issue of the buoy line, the Lebanese insisted on not rescinding their position about maritime points 18 and 19 (located near the shore), which had been deposited with the United Nations along with all the other points that they maintain serve as their starting point of the MBL.³¹ In other words, at least with regard to the buoy line, the agreement does not end the conflict. The starting point of the MBL will become a point of contention if and when a permanent LBL is negotiated between the parties in the future, casting doubt on the continuation of negotiations – and perhaps even causing a deterioration of the situation around the route of the LBL. This would contravene the objectives that Israel set itself for this agreement.

³⁰ Ibid, para. 1(5): "The Parties agree that this Agreement, including as described in Section 1(B), establishes a permanent and equitable resolution of their maritime dispute."

³¹ Protocol 127 of the Knesset Foreign Affairs and Defense Committee, 10 [Hebrew].

Developing the Block 9 Prospect (a.k.a. the Sidon or Qana field)

The second section of the agreement addresses the location of the cross-border gas and petroleum field known as Block 9 which straddles the MBL. The agreement formalizes the principles for the development of the Block 9 Prospect. The agreement provides for separate commercial agreements to be signed in the future, which will ultimately determine, *inter alia*, the identity of the developing entities that will be granted the rights to develop the Block 9 Prospect and what mechanisms will govern its commercial cooperation.

Achievements

The agreement specifically addresses the potential for energy extraction from the Block 9 Prospect, about which there is already plentiful technical information from previous maritime surveys carried out in the area. The existing information about the Block 9 Prospect suggests that most of the gas in the field is probably on the Lebanese side of the new MBL, and only a smaller portion lies on the Israeli side. The agreement contains a joint declaration that the sides "understand that there is a hydrocarbon prospect of currently unknown commercial viability that exists at least partially in the area," which appears to straddle the MBL. There are no precise numbers that can be used as points of reference in the agreement on this matter, or any other benchmarks to rely on. The agreement does not stipulate the division of rights and obligations in relation to the development of Block 9 Prospect and the gas field that straddles the MBL between Israel and Lebanon, and the agreement contains no commitment by the Government of Lebanon to cooperate directly with Israel.

Nevertheless, the agreement clearly states that Israel is entitled to a share of the economic rights in the Block 9 Prospect, inasmuch as it lies beyond the MBL – a matter that had not been accepted by the Lebanese until the signing of the agreement. Although the media seems to have settled on the claim that this constitutes approximately 17 percent of the total area of the cross-border gas field, the actual size of the gas field in the Block 9 Prospect and any economic right entitlements attached thereto will only be determined after future exploratory studies and the conclusion of an agreement to develop the field with the operator of the Block 9 Prospect.

Agreeing on the "rules of the game" with respect to developing the Block 9 Prospect is a clear achievement for both sides. Although Lebanon has a clear interest in developing the Block 9 Prospect as quickly as possible, experience has shown that this sort of agreement can be difficult to obtain. Israel and Cyprus, for example, have not yet managed to reach an agreement, after ten years of negotiations, about the division of economic rights for

the Aphrodite gas field, which also straddles their MBL, so arrangements for the division of entitlements from the gas field in the present agreement is a positive step forward, which will prove to be critical in the race to develop the Block 9 Prospect in the future.

Another significant achievement for Israel in connection with the development of the Block 9 Prospect is that the agreement explicitly defines the commercial profile of the international corporations that will be entitled to lead this development; specifically, among other things, the partners involved may not be subject to international sanctions. It bears noting that recently, the Russian oil and gas firm Novatek returned to the Government of Lebanon all of its holdings in Block 9, representing 20 percent of the rights thereto, and has quit the project. At the time of writing this report, it had not yet been decided, who will permanently enter the project in their place.

The creation of a framework that enables Israel to realize its economic rights in this potential gas field represents an achievement for Israel. The agreement stipulates that "Israel will be remunerated by the Block 9 Operator for its rights to any potential deposits in the Prospect and to that end, Israel and the Block 9 Operator will sign a financial agreement prior to the Block 9 Operator's Final Investment Decision" ("FID"). The negotiations on this matter will be held directly between Israel and the Block 9 Operator who will ultimately be responsible for transferring to Israel any compensation to which Israel will be entitled for its economic rights to the gas field.

Importantly, Lebanon insisted that it would not be a party to any agreement with Israel on this matter and that the entire Block 9 Prospect would be "developed by Lebanon's Block 9 Operator exclusively for Lebanon", consistent with the terms of this Agreement, and in a manner that shall not affect Lebanon's agreement with the Block 9 Operator, and the full share of its economic rights in the Prospect".³² On the Israeli side, the Block 9 Prospect economic rights will most likely be managed by the Government of Israel on its own or by means of a license or lease granted to a third party.

Challenges

The agreement between Israel and the Block 9 Operator will be a commercial agreement which will reflect the understandings between the two states. At present, there are still several information gaps between the various parties about the technical details of the Block 9 Prospect, which may seriously impede the formation of a binding economic agreement in the future.

³² Israeli-Lebanese maritime agreement, section 2(5).

Moreover, a legal regime asymmetry has now emerged in light of the MBL. Thus, for example, whereas the taxation regime governing the profits from the Block 9 Prospect on the Israeli side is already known and set in place after years of commercial experience with royalties from natural resources, Lebanon is still in the very early stages of developing a gas sector and there are questions around the tax regime to which the gas field will be subjected on its side. If the Government of Lebanon decides in the future to impose upon the Block 9 Operator especially high taxes on profits attributed to the gas field with the intent of maximizing its own revenue streams, then it may jeopardize the entire agreement. In other words, even though Israel and Lebanon are not directly linked through this gas field contractually, each state's conduct with respect to the Block 9 Operator will affect the manner in which the prospect will be developed and operated.

Another challenge concerns the level of compensation and royalties that Israel will actually receive in practice. Although the agreement makes clear the geographic area that falls under Israel's jurisdiction, after a final, three-dimensional mapping of the Block 9 Prospect and additional drilling activities, Israel's entitlements could grow or shrink substantially, depending on the findings. For example, it may turn out that the relative share of the Block 9 Prospect on the Israeli side contains more than previously thought, and Israel's demands for compensation will grow accordingly. Such calculations will likely stoke disagreement and tensions between the two sides in the future.

The agreement states that the development of the Block 9 Prospect will be solely for the benefit of Lebanon. This means that Israel will not be entitled to receive gas or petroleum extracted from the Block 9 Prospect for its own use. The agreement commits Israel to not develop its side of the Block 9 Prospect independently, freeing up the operatorship of the project to the Block 9 Operator. Israel has also committed not to object to reasonable and necessary activities, such as navigational maneuvers, that the Block 9 Operator may wish to conduct immediately south of the MBL in pursuit of the Block 9 Operator's exploration and exploitation of the prospect, so long as such activities occur with prior notification by the Block 9 Operator to Israel, and Israel has pledged not to unreasonably impede the development of the prospect.

The agreement contains no reference to the question of whether Lebanon could export surpluses of hydrocarbons to neighboring states and how it might do so. The agreement does not stipulate exactly what hydrocarbons will be produced from the Block 9 Prospect (such as oil, natural gas, condensate, hydrogen, LNG, methanol, ammonia, etc.). These are parameters that will affect the field's profitability and will be determined in agreements with the operator.

Development of Future Hydrocarbon Prospects across the MBL (other than the Block 9 Prospect)

The third section of the agreement establishes both sides' consent to call on the assistance of the United States once again if disagreements arise between them concerning the development of additional resources along the MBL.

As it stands, there is no concrete information about the existence of any additional hydrocarbon reserves along the new MBL between Israel and Lebanon. During the negotiations, both sides were wary of making tangible concessions, in case new cross-border reserves along the MBL were discovered in the future. Therefore, the agreement does not settle the question of the future development of additional prospects. The agreement states that "each Party shall share data on all currently known, and any later identified, cross-MBL resources with the United States, including expecting the relevant operators that operate on either side of the MBL to share such data with the United States" and will conduct a dialogue with the United States about such issues. If new discoveries are made in the future along the MBL, the sides will present the issue to the United States, which will offer assistance in a manner acceptable to both parties at the time. Moreover, both sides have effectively forgone claims to any resources that might yet be discovered on each other's side of the MBL.

The agreement incorporates a declaration by the United States, committing to "exert its best efforts and endeavors in order to facilitate Lebanon's immediate, swift and continuous petroleum activities".

The United States' Continuing Role as a Mediator and Facilitator in the Future

The fourth section of the agreement states that if differences arise between the parties concerning the agreement, the parties will turn to the United States to try to reach an agreement. Similarly, the text stipulates that the agreement will come into force once the United States sends a notice that both parties have accepted, in writing, the terms of the agreement as laid out in the annexes. For Israel, it is important that the United States act as the mediator and facilitator in relation to this agreement. There is a concern that Lebanon would otherwise appeal to international institutions to resolve any disputes, which would not necessarily serve Israeli interests.

Summary and Future-Looking Conclusions

The 2022 Delimitation Agreement Between Israel and Lebanon is extremely important, in every possible sense. The general elections in Israel, during which the agreement was presented to the public, impeded any serious and in-depth discussion on the matter in Israel. Now, however, we may look ahead and consider how it would be proper to address the challenges that the agreement poses.

Israel must devise a policy and strategy concerning its maritime domain. It must recognize the sea as a national asset and regulate it, taking a broad and long-term perspective. First and foremost, it must complete the legislative process to pass the 2017 Marine Areas Bill through which Israel would, among other things, define in its laws the process for determining its maritime borders. Israel must determine the point on land that will serve as the starting point for its MBL with Lebanon, which will affect its starting position in any future negotiations. Israel must also deposit the economic aspects of the agreement to parliamentary and ministerial oversight and examine whether it is appropriately realizing its rights to the Block 9 Prospect. This is a complex issue that will require professional knowledge, which must be sustained over time.

Israel must also consider the positioning of future offshore infrastructure in its EEZ. The location of the Floating Production Storage and Offloading facility ("FPSO") for the Karish field was used as a pawn by both sides in their attempts to reach an agreement over the MBL.

Israel must formulate a policy for positing future offshore infrastructure in its EEZ after careful consideration of all relevant factors. Israel must make it clear that since it is ultimately responsible for, and will also fund, the defense of Israeli offshore infrastructure in its EEZ, Israel must also decide the location of future offshore infrastructure as well; offshore operators must take this into account when developing their field development plans (or FDPs).

It will not be long before pressure mounts on Israel to assist the development of the Gaza Marine gas field and other prospects located off the coast of the Gaza Strip owing to the deleterious economic situation there.³³ The resolution of the Lebanese maritime matter may serve as inspiration and precedent in any attempt to resolve the maritime conflict around Gaza. Israel should consider its position on the Palestinian Authority's declaration

³³ Orin Shefler, "UNCLOS, Delimitation of Maritime Boundaries and Offshore Infrastructure as a means for Regional Cooperation and Reconstruction of the Gaza Strip," in Shaul Chorev and Ziv Rubinovitz (eds.), *Maritime Strategic Evaluation for Israel 2021/22* (Haifa: Maritime Policy & Strategy Research Center, University of Haifa, 2018), pp. 311–332.

of an EEZ off the coast of Gaza (although Israel has already expressed its official and obligatory opposition on this matter).³⁴ Likewise, Israel must examine the possibility of future offshore developments near Gaza, even while Hamas maintains controls the Gaza Strip, perhaps with the assistance of Turkey, with which Israel has recently warmed its relations on energy matters.

The Delimitation Agreement between Israel and Lebanon is a hopeful sign and points to the latent possibilities of the maritime domain. The agreement heralds a new era in relations between Israel and Lebanon, even if both sides are trying to lower expectations. But even more importantly, the agreement demonstrates that hostile states can still cooperate in the maritime domain even when on land, they struggle to do so.

One may hope that the agreement with Lebanon will bring economic prosperity and growth to the entire region.

³⁴ ["Israel's deposit of its opposition to the Palestinian Authority's move,"](#) January 14, 2020 [Hebrew].

From Sea to Shining Sea: The Reorientation of Turkish Foreign Policy in 2022

Omri Eilat

2022 was a year that redefined Turkey's regional role. In a relatively short time, it was transformed from a regionally destabilizing force in the Eastern Mediterranean to a force for relative stability across the wider region. This shift came after a period in which Turkey went knocking on the doors of the U.S. administration and strenuously courted states in the Middle East with closer relations to the United States, namely Israel, Egypt, and the United Arab Emirates,¹ in order to rehabilitate its relationship with Washington while receiving a reception that can be characterized as somewhere between cautious and chilly. Russia's invasion of Ukraine and the severe crises triggered by the prolongation of the war provided a once-in-a-generation opportunity for Turkey to improve its geopolitical standing. President Recep Tayyip Erdoğan's administration grabbed this opportunity with both hands and took action as the new circumstances required. Whereas Turkey in the summer of 2020 was supposedly the local troublemaker of the Mediterranean region,² Turkey in the fall of 2022 was the responsible adult of the Black Sea basin region. Nevertheless, Turkey's reorientation is determinedly not a strategic shift in its approach to its role in the Middle East and beyond, nor has it abandoned its maritime boundary demands.

Turkey's reorientation and NATO

Russia's invasion of Ukraine dramatically improved Turkey's position in NATO, not least because of its critical strategic position. Even before the Russian invasion of Ukraine, Turkish Foreign Minister, Mevlüt Çavuşoğlu, had announced the closure of the Bosphorus and Dardanelles straits to Russian warships and thus restricted the Russian Navy's activities in the Black Sea. Thus, not only did Turkey bolster its position as a key NATO member, with the second-largest military in the alliance; but it also reinforced the 1936 Montreux Convention, which affirmed the status of the straits and of the Sea of Marmara as international waters and authorized Turkey to close them to warships during times of

¹ "[Turkey, UAE sign investment accords worth billions of dollars](#)", *Reuters*, November 24, 2021; Jonathan Lis, "[Bennett Thanks Turkey's Erdogan for Couple's Release in First Call Since 2013](#)", *Haaretz*, November 18, 2021; Salim Çevik, "[Erdogan's Endgame with Egypt](#)", *The Cairo Review of Global Affairs*, August 6, 2021.

² Omri Eilat and Ayal Hayut-man, "The Turkish Maritime Doctrine: Blue Homeland (Mavi Vatan)," in Shaul Chorev and Ehud Gonen (eds.), *Maritime Strategic Evaluation for Israel 2020/21* (Haifa: Maritime Policy & Strategy Research Center, University of Haifa, 2021), 187–195.

armed conflict.³ Not only did the Erdoğan government, therefore, prove its dependability in upholding a convention that predated the United Nations; but it also positioned Turkey as a power that supported the international order, precisely as it was weakening. This came after a period in which Turkey aggressively challenged the U.N. Convention on the Law of the Sea (UNCLOS) in the Eastern Mediterranean.

Another important factor in reinforcing Turkey's NATO membership has been the tightening of the alliance and its increasing relevance in the face of the concrete Russian threat to Europe. This process has led other nations to want to join it. Chief among them is Ukraine, which cannot join NATO because it is embroiled in an armed conflict, but the shifting attitudes of the traditionally cautious Finland and Sweden are no less dramatic. The right of every NATO member state to veto new admissions has automatically made Turkey the kingmaker on the subject of Sweden and Finland's accession to NATO.⁴ This situation has given Turkey clear leverage against the Kurdish immigrant lobby in Sweden, which has expressed enthusiasm for Kurdish separatism. Turkey achieved what it wished for when Sweden and Finland extradited 73 individuals considered by Turkey to be terror activists, most of them PKK members.⁵ Turkey acted as the United States expected of it when it underscored the risks it was taking by standing up to Russia, and the admission of these new members is only one example.

The ultimate mediator

Turkey's relations with Russia were extremely complicated even before the war in Ukraine. Both states' engagements in a host of theaters had sometimes brought them into direct confrontations. In Syria, cooperation between them was still possible, but the deviations were dramatic, even if they may be seen as accidents. One especially memorable incident was the downing of Russian military aircraft by Turkish jets. Tensions around Syria reached a boiling point again with the assassination of the Russian ambassador in Turkey, along with the killing of 34 Turkish soldiers by Bashar al-Assad's forces with Russian arms and protection. Unlike in the case of Syria, Russia and Turkey found themselves on opposite sides of the Libyan Civil War from its outbreak, with Turkey supporting the Islamist Government of National Accord and Russia backing Egypt in its support for the forces of General Khalifa Haftar.⁶

³ *Al-Jazeera*, "[Turkey warns against passing of warships from its straits](#)", March 1, 2022.

⁴ Jill Lawless and Joseph Wilson, "[Turkey lifts its objections to Sweden, Finland joining NATO](#)", *AP News*, June 28, 2022.

⁵ Phelan Chatterjee, "[Who are 'terrorists' Turkey wants from Sweden and Finland?](#)", *BBC News*, July 5, 2022.

⁶ Remi Daniel, "[Turkish-Russian Relations: A Puzzle That Shakes the Middle East](#)", *Turkeyscope*, 5, no. 3 (2021).

In general, the conflicting interests in Libya and unavoidable collisions in Syria did not detract from Turkey's known tendency to rely on Russian support in cases of dissatisfaction with its cooperation with the United States. The S-400 deal with Russia and Turkey's exclusion from the F-35 project led Turkish-U.S. relations to a dead end and delivered a significant achievement to Russia's efforts to gain a foothold in the Eastern Mediterranean.⁷ Moreover, the complexities of geopolitics have not destabilized Turkish-Russian economic cooperation, especially in the energy sector, which both nations have a weighty interest in maintaining. Some 74 percent of Turkey's gas consumption comes from Russia via the Turk Stream and Blue Stream pipelines. Another important project whose significance extends far beyond the Turkish energy market is the establishment of the Akkuyu nuclear energy plant, with almost 100 percent funding from Russia's state energy corporation, Rosatom.⁸

Meanwhile, Turkey has enjoyed extensive relations with Ukraine for thirty years. It recognized its statehood at the end of 1991, mere months after it declared independence. On the eve of the COVID-19 crisis, in 2019, Turkish-Ukrainian bilateral trade stood at over \$4 billion, and the investments and open projects of hundreds of Turkish companies were valued at over \$6 billion. Nevertheless, considering the current situation, the most significant deal that year was the sale to Ukraine of Bayraktar UAVs manufactured by a company owned by Erdoğan's son-in-law. According to the Ukrainian Government, it entered the war in late February 2022 with 20 of these drones; by the end of the summer of 2022, Ukraine was believed to possess at least 50. We know that these drones played a significant role in the sinking of the *Moskva* warship, which led to the relaxation of the naval blockade and the withdrawal of Russian forces from Snake Island. Turkey's aviation knowledge and the successful operational experience of the Bayraktar UAVs from the Azerbaijan-Armenian War of the summer of 2020 have given Ukraine a clear advantage in the field of UAVs against the Iranian-made UAVs acquired by the Russian military, which are nowhere as successful as the Bayraktar.⁹

Turkey's expansive and intricate ties with both sides, taken together with the significant rise in its standing within NATO, have made it a clear third party to this conflict. On the

⁷ Henri J. Barkey, "[Why There's No Easy Solution to the U.S.-Turkey Dispute Over the S-400](#)", *World Politics Review*, December 29, 2020.

⁸ Elena Schislyaeva, Irina Evgrafova, Nadezhda Butakova, and Yuri Mishalchenko, "The EU – Russia – Turkey Energy Triangle: Legal and Economic Conditions of Gas Transportation via the TurkStream Pipeline", *Transportation Research Procedia*, 63 (2022): 1984–1990.

⁹ Ragıp Soylu, "[Ukraine received 50 Turkish Bayraktar TB2 drones since Russian invasion](#)", *The Middle East Eye*, June 22, 2022; H. I. Sutton, "[Incredible Success of Ukraine's Bayraktar TB2: The Ghost of Snake Island](#)", *Naval News*, May 18, 2022.

one hand, it has condemned Russia's indiscriminate assaults on Ukrainian civilians; on the other, it has refrained from joining the United States and European Union's sanctions against Russia. This cautious position has made it the ultimate mediator between the sides. At the start of the war, there was a competition between Turkey and Israel over this status, but Turkey had many more overlapping interests with Russia and Ukraine, so it was much more suitable than Israel. Its biggest success as a mediator is the export corridor for Ukrainian wheat through the Black Sea, escorted by Turkish ships.¹⁰ Taken together, these developments leave no room for doubt: Turkey's primary domain has shifted from the Mediterranean Basin to the Black Sea.

Europe's energy corridor

The sanctions that the United States and other Western nations imposed on Russia forced some of them at the start to grapple with the question of their dependence on Russian gas supplies, and then with disruptions to this supply. The most striking case was Germany, which is dependent on gas delivered through the Nord Stream 1 and 2 pipelines, with no possibility of finding an alternative supplier at such short notice. Importing liquefied natural gas (LNG) in tankers from the United States was one possible alternative, but far from enough to cover shortages in case the supply of Russian gas was cut off. Indeed, during the war, the deliberate sabotage of the two pipelines left Germany with no good options to procure gas. In contrast with this gloomy picture, Turkey offers Europe its most reliable energy corridor. Much of the gas that passes through Turkey comes from Russian sources, but it is supplemented by gas in pipelines from Azerbaijan, Iran, and Iraq. Turkey's desire to boost its status as Europe's energy corridor has guided its diplomatic efforts, including in the Mediterranean Basin.¹¹

In March 2022, during President Isaac Herzog's visit to Turkey, Erdoğan devoted a large part of his speech to cooperation in the energy sector and went down into technical details about possible joint drilling operations.¹² Turkey's efforts to reconcile with Israel and the United Arab Emirates stem not only from a desire to become close again to the United States' most stalwart allies in the Middle East; Turkey itself suffered a serious gas shortage in the winter of 2021–2022, and its gas market suffers from a structural vulnerability given the cessation of the gas supply from Iran every winter.¹³ Turkey hopes that purchasing gas from Israel through a pipeline to be laid across the exclusive economic

¹⁰ *Daily Sabah*, "[Turkey expects Black Sea grain corridor deal in writing this week](#)", July 20, 2022.

¹¹ Kadri Tastan, "Turkey and European Security", *SWP Comment*, no. 38 (2022): 1–8.

¹² *Reuters*, "[Erdogan tells Israel's Herzog synergy in energy mutually beneficial – Turkish presidency](#)", April 1, 2022.

¹³ *Financial Times*, "[Turkish industry hit by power cuts amid gas supply troubles](#)", January 24, 2022.

zones (EEZs) of Israel, Lebanon, and the unrecognized Turkish Republic of Northern Cyprus will address this problem and safeguard its strategic position as Europe's southern energy corridor.

Turkey's opposition to the installation of the EastMed pipeline since 2018 is rooted in its historical conflict with Greece and Cyprus over their EEZs, but also in the fact that it would create an adjacent, rival energy corridor. Israel's rapprochement with the United Arab Emirates, which reached its peak with the Abraham Accords, signed in September 2020, and the agreement to export Emirati petroleum through the Trans-Israel Pipeline were seen as a strategic challenge by Turkey, at minimum, and were understood as a step to undermine Turkey's position. Turkey's relations with the nations of the Eastern Mediterranean have shifted, not least with Israel and Egypt following the change of administrations in the United States at the start of 2021, but Russia's invasion of Ukraine had a more powerful impact on this process, deepening it further.

The Rapprochement with Israel

Turkey sees Israel as a force that can traditionally open doors to U.S. administrations. Nevertheless, even if Turkey's reconciliation efforts with Israel in 2021 were partly an attempt to improve Ankara's standing with the U.S. administration, since Russia's invasion of Ukraine, Turkey's importance to the United States is clear in its own right. It does not need Israel in order to move more effectively through the hallways of Congress and the White House. The continuation of this trend is consistent with Turkey's renewed attempt to position itself as a Middle Eastern regional power by peaceful means.

The rise of the Bennett-Lapid government in Israel clearly removed an obstacle to Turkish-Israeli rapprochement. Then-Prime Minister Naftali Bennett was not actively involved in these rapprochement efforts and left them to President Herzog, who conducted the first official visit of its kind in a long time in Ankara at the start of March 2022. Still, then-Foreign Minister Yair Lapid advanced this process by visiting Ankara and hosting Mevlüt Çavuşoğlu in Israel in May 2022. As prime minister, Lapid met with Erdoğan at the U.N. General Assembly and completed the process of returning ambassadors to Ankara and Tel Aviv. The phone call between Erdoğan and Netanyahu after the latter's victory in Israel's November 2022 elections strengthens the trend of the full normalization of relations, but it is too early to declare a *fait-accompli*.¹⁴ In any case, nobody currently disputes that Turkey's desire to draw closer to Israel is part of an organized policy and no mere whim.

¹⁴ Lazar Berman, "[In first phone call since 2013, Netanyahu, Erdogan pledge to build 'new era' in ties](#)", *Times of Israel*, November 17, 2022.

This series of diplomatic visits began with Israel's announcement that, as a matter of principle, its rapprochement with Turkey would not come at the expense of its ties with its closest allies, Greece and Cyprus. This found expression in Herzog's visit to Greece before his visit to Turkey.¹⁵ The Turkish government accepted this position, while Israel internalized the Turkish strategy of cooperating around shared interests, whatever their conflicting interests in other arenas. Despite the expulsion of members of Hamas's military wing from Istanbul, Turkey has continued to express great enthusiasm and interest in the Palestinian cause, and it sees Hamas as a legitimate party, and in the case of the AKP, even as a sister party, as a fellow part of the Muslim Brotherhood.

Another development that Turkey was watching the progress toward the signing of a maritime boundary agreement between Israel and Lebanon.¹⁶ Its final ratification removed the last hurdle to start drilling operations in the Karish gas field. At this stage, Israel cannot export gas directly to Europe, doing so instead through liquefaction plants in Egypt. Still, the proliferation of drilling operations and active gas wells on the eastern shoreline of the Mediterranean has raised Turkish hopes for renewed negotiations (the last round failed in 2013) for the construction of a pipeline through Turkish territory, through which Israel and Lebanon will be able to export gas to Turkey itself or to European states through Turkey.¹⁷ Turkey is also continuing to try to find a way to get involved directly in drilling the gas reserves along the Lebanese coast, and it has its eyes on the gas prospects in the Palestinian Authority's EEZ off the coast of the Gaza Strip. Israel, for its part, on the one hand, expects Turkey to halt its assistance to Hamas, and on the other hand, has consistently objected to the Turkish government's involvement in various mediation efforts ever since Erdoğan's first offer to Ehud Olmert to mediate the resolution of the conflict. The new chapter that has opened in Israeli-Turkish relations, short as it may yet be, involves Israel's acceptance of Turkey's relationship with Hamas, alongside Turkey's acceptance of Israel's close relations with Greece.

Regular tensions: Turkey and Greece

The tensions along the maritime boundary between Turkey and Greece over the past year, during which it appeared on several occasions that the two nations would find themselves on the brink of war, are a variable that is independent of Turkey's relations with the broader international institutions to which they both belong. Despite the strengthening of NATO and the fact that both Turkey and Greece are member states, the conflict over

¹⁵ Tal Schneider, "[Herzog head to Greece for state visit as Turkey détente brews](#)," *Times of Israel*, 24 February, 2022.

¹⁶ TRT Haber, "[Lübnan'dan İsrail ile deniz sınırı anlaşma taslağına dair açıklama](#)", October 10, 2022.

¹⁷ Reuters, "[Turkey Seeks Israeli Gas, but Politics Are in the Way](#)", *Haaretz*, November 3, 2013.

the maritime boundary between them continues to cause shockwaves. This maritime conflict predates the international organizations and arrangements designed to resolve such boundary disputes. It stems from the success of the European powers, chiefly the British Empire, in wresting control of the shipping lanes in the Mediterranean, Red Sea, and Persian/Arab Gulf from the Ottoman Empire in the nineteenth and twentieth centuries. The loss of Cyprus (to Britain in 1878), Crete (which united with Greece in 1908), and the Dodecanese (to Italy in 1911) in violation of the international guarantees given to the Ottoman Empire has been seen as a historic injustice by successive Turkish governments. It underpins Turkey's inbuilt suspicion of international institutions.¹⁸ Turkey's historical attachment to the Black Sea is similarly linked to the same legacy of protracted Ottoman control of the entire basin, but unlike in the Aegean and Mediterranean, Turkey is a force for stability there, not a revisionist actor with demands of its own.

Even though Turkey has stopped regularly invoking its imperialistic Blue Homeland doctrine for the Eastern Mediterranean and the Aegean Sea, its demands for a wider EEZ and its structural vulnerability resulting from the proximity of islands under Greek sovereignty along its shores remain unchanged. The dispute over Turkey's maritime boundaries has entailed a dispute over air space, as seen last year with the proliferation of violations on both sides and mutual accusations of provocations. While Turkey has worked to improve its relations with the White House, Greece enjoys unwavering support from the United States. This support received pronounced expression with the visit of Greek Prime Minister, Kyriakos Mitsotakis, to Washington in May 2022, where he was received warmly and enthusiastically at Congress, where he delivered a speech, and at the White House, where he met with President Joe Biden. The improvement in Greek-U.S. relations under the Biden Administration adds another layer to Greece's membership of the European Union and its repeated claims that Athens is defending the borders of Europe. Greece frames its position in the European Union this way, and the new waves of refugees since the U.S. military's withdrawal from Afghanistan have kept these efforts intact in the face of Turkey's leverage against the institutions of the European Union as the main point of transit for refugees from Muslim states in Asia. Last summer, Greece started work to extend the border fence between it and Turkey from 40km (25 miles) to 120km (75 miles).¹⁹

The fact that both countries have entered an election year has heightened the combative rhetoric and both sides, playing an important role in both nations' local politics since

¹⁸ Mustafa Aksakal, *The Ottoman Road to War in 1914: The Ottoman Empire and the First World War* (New York: Cambridge University Press, 2008): 4–7.

¹⁹ Tasos Kokkinidis, "[Greece to Extend Fence Along the Entire Length of the Border with Turkey](#)", *Greek Reporter*, August 23, 2022.

backing or calming down would be interpreted by public opinion as weakness. This tension has increased concerns in the European Union of a possible Turkish invasion of Greece. Nevertheless, Turkey's threats to conquer Greece in a matter of days have come in tandem with an understanding that has trickled down in all states in the region, which are all looking at the Russian military's entanglement in Ukraine, that any country's invasion of its neighbor would lead to disastrous consequences for the invading power. Turkey is not as isolated nowadays as it was in late 2020, but precisely for this reason, it has much more to risk. Moreover, in addition to the disagreements and tensions, there exists a longstanding framework for dialogue between the two states, to which we must add infrastructure for dialogue between Erdoğan and Mitsotakis. In early October 2022, both leaders declared their openness to dialogue and conversation to reduce any tensions that might flare up in the near future.²⁰

Conclusion

Turkey's reorientation represents a natural shift that stems from its strategic thinking and critical position in the war in Ukraine, which the whole world has been watching since the start of 2022. Its activities over the past year have been based on both damage control and seizing opportunities in the context of the war. It would be a mistake to see Turkey's steps as heralding an irreversible long-term strategic shift. It has not taken a one-sided position against Russia, nor has it cut itself off from the United States or quit NATO over the crisis period of the past decade. Moreover, the improvement in its foreign relations has not at all alleviated the profound crisis of the Turkish economy, which remains a burning issue for its citizens and the most impactful for the country's fate in the coming years. The success of the Turkish arms exports market, even with the "seal of quality" lent by their operational experience, does not come close to covering the gaping hole in the Turkish economy, reflected in galloping inflation at the highest rates in the world (having risen from 36.1 percent at the start of 2022 to a record 85.5 percent in October of the same year) owing to the political management of the nation's economy.

Nevertheless, the change in Turkey's role is not a matter of whim, and it may be relied on to be stable in the near and medium terms. Bigger initiatives to guarantee the region's long-term stability will require all sides to compromise on historic issues, such as with a resolution of the Israeli-Palestinian conflict or a resolution of the Cyprus issue and the Turkish-Greek maritime boundary. The eventual end of the war between Russia and Ukraine may incentivize Turkey to increase its demands, in recognition of its contribution

²⁰ Okan Müderrisoğlu, "[Pursuing dialogue does not equate to weakness: Türkiye tells Greece](#)", *Daily Sabah*, October 20, 2022; *VOANews*, "[Greece Says It's Open to Talks with Turkey Once Provocations End](#)", October 2, 2022.

to minimizing the damages of the war, mediating between the warring parties, and maybe even ending the conflict altogether. Turkey's heightened attention to the Black Sea Basin is temporary and will not moderate its demands in the Mediterranean and Aegean. It would be prudent to take advantage of the present crisis that all the relevant parties find themselves in now to reach understandings that will prevent the conflict from flaring up in the future or that will at least tone it down.

Türkiye–Israel Collaboration and Energy Diplomacy*

Oğuzhan Akyener and Abdullah Altun

The international system is undergoing a major transformation, mainly related to the changing structure of global value chains (GVCs). A GVC basically refers to the full range of globally dispersed activities for bringing a product from its conception to beyond final consumption.¹ Since the mid-1980s, the world has experienced what could be called the second great unbundling (or GVC revolution), which means that the separation of production stages across countries has become more attractive.² Thus, the GVCs dominate the global economy. Multinational-enterprise-coordinated GVCs account for more than 70 percent of global trade.³ Since the 2007–8 food crisis and the 2008 global economic crisis, the expansion of GVCs has been disrupted. In particular, the self-sufficiency concerns after the 2007–8 food crisis and protectionist sentiments after the 2008 global economic crisis continue to increase because of the trade wars (2018), COVID-19 (2020–21), and the Russia-Ukraine war (2022).⁴ The transformation of the existing value chains and the changing weight of the current production and consumption hubs are just some of the main signs. In this transition period, new collaborations, such as the Regional Comprehensive Economic Partnership (RCEP), Union State (a supranational union consisting of Russia and Belarus), and AUKUS (trilateral cooperation between Australia, the United Kingdom, and the United States), associated with new conflicts are emerging. The East, which is getting stronger and consuming more, unsettles the existing system dominated by the West. The war between Russia and Ukraine and the unjust annexation of Ukrainian lands by Russia cause much more grave concerns in this context.

* Editor's note: We welcome the inclusion of the article in this year's Maritime Strategic Evaluation of the Maritime Policy and Strategy Research Center. However, we emphasize that its content and terminology reflect only TESPAM's views.

¹ G. Gereffi and K. Fernandez-Stark, [Global Value Chain Analysis: A Primer](#), 2nd ed. Center on Globalization, Governance & Competitiveness (Durham, NC: Duke University, 2016).

² R. Baldwin, *Globalization: The Great Unbundling(s)*, prepared for the Finnish Prime Minister's Office as a Part of Finland's EU Presidency Programme, Economic Council of Finland, 2006; R. Baldwin, *The Great Convergence: Information Technology and the New Globalization* (Cambridge, MA: Belknap Press of Harvard University Press, 2016).

³ OECD, WTO and UNCTAD, [Implications of Global Value Chains for Trade, Investment, Development and Jobs](#), prepared for the G-20 Leaders Summit, St. Petersburg, Russian Federation, 2013.

⁴ FAO, [The State of Agriculture Commodity Markets 2015–16. Trade and Food Security: Achieving a Better Balance between National Priorities and the Collective Good](#) (Rome, 2015); M. Datt, B. Hoekman, and M. Malouche, *Taking Stock of Trade Protectionism since 2008*. Economic Premise, No. 72 (Washington, DC: World Bank, 2011).

In this painful transition period, climate concerns, migration, and the energy crises negatively affect large energy import-dependent economies, such as the EU. At this point, multilateralism becomes much more important than ever to solve complex problems. In terms of geostrategic location, Türkiye and Israel are at the very center of the relevant global transition process. For this reason, cooperation between Türkiye and Israel will make significant contributions toward the stability of the region, sustainability of the value chains, resolution of the regional conflicts, contribution to the energy supply security of the allies, combating climate change, and minimizing the negative effects of migration.

In this article, after indicating some significant points about the contemporary transformation of the global economy, the increasing importance of energy diplomacy, Türkiye's growing role in this context, and the multifaceted benefits of Türkiye–Israel cooperation will be discussed.

Future of Global Crisis within the Context of Energy and Climate Change

The world is in an era of a great transformation. Although some scholars claim that there is considerable renunciation of globalization, the possibility of a new wave of globalization also seems very realistic. Indeed, partial de-globalization can be observed within the context of an ongoing globalization algorithm, but there are obvious signs of a new wave of globalization with a new trajectory. Since the 1990s, developed countries have outsourced various phases of their domestic production by using their outward foreign direct investments (FDIs). Abovementioned GVCs are the results of these outsourcings. When the FDIs of developed nations arrive in destination countries, they benefit from the lower local wages, import intermediate products from various countries to produce there and export all over the world from these destination countries. As a result of this algorithm, even foreign invested enterprises (FIEs) accounted for approximately half of the imports and exports of China, although they are responsible for just 17 percent of industrial production of China.⁵ Not restricted to this example, many developing countries host considerable amounts of FDIs from developed nations and produce for them within the context of this algorithm. However, this algorithm is threatened by the abovementioned self-sufficiency concerns and protectionist sentiments. Most probably they will be the main driver of the transformations in the GVCs. There is no doubt that some of the most important issues in the midst of this great transformation are the contemporary energy

⁵ These ratios are the authors' own elaborations using data from the [National Bureau of Statistics of China](#) (NBSC), *China Statistical Yearbooks 2000*; NBSC, *China Statistical Yearbooks 2006*; NBSC, *China Statistical Yearbooks 2010*; NBSC, *China Statistical Yearbooks 2011*; NBSC, *China Statistical Yearbooks 2016*.

crisis and climate change. To clarify these issues further, we should consider their short-, medium-, and long-term dimensions separately.

Winter is coming! The 2022–23 winter will be very challenging for Europe. As the primary energy provider for Europe, Russia cut off gas exports to Europe. According to alternative scenarios, it does not seem possible for Europe to utilize other resources in the short run to satisfy their energy needs. Thus, such a difficult situation will have serious consequences for governments, enterprises, and households. Associated recession risks and increasing political instability are just some of these consequences. Contrary to emissions targets, Europe has started to operate its conventional energy facilities again. Europe's efforts toward reducing emissions seem to have been badly damaged as a result of the Russia-Ukraine war. Whether these outcomes can be results of the struggle between producers of conventional energy resources and alternative or renewable energy producers is an important question nowadays.

Here one important point should be further clarified: Is this short run energy crisis due to lack of energy? Of course, there are hesitations about the sufficiency of the world energy resources in the long run, but the current crisis is not related to this. The increasing energy prices that threaten the sustainability of contemporary production hubs and trade networks are very consistent with the power struggle in GVCs.

A series of events starting with the 2008 global economic crisis increase the tendency toward self-sufficiency concerns and protectionist sentiments among nations. The 2018 United States–China trade wars, the COVID-19 pandemic, and the Russia–Ukraine war all have very similar effects in terms of self-sufficiency and protectionism. Although this is a threat for available value chains, whether this situation may result in construction of new value chains is another question of interest.

The bipolar international system after World War II dominated global relations until the dissolution of the Soviet Union. Interestingly, the current environment after the Russia–Ukraine war bears traces of the bipolar world order. From a different point of view, the rise of China since the 1990s, driven mostly by Western FDIs, cannot be ignored. Although China once was supported mainly by the United States until it reached a certain level of production, the United States in recent years mainly tries to restrict China. Thus, the world goes toward a new world order, but whether this new order will be a bipolar or a multipolar order is not fully understood yet.

Technological leadership cannot be separated from all of the abovementioned topics of interest. China shows real progress in terms of intellectual properties and scientific studies. According to the latest statistics, China is the leader in terms of patent applications

(see Table 1) and a leader in the production of scientific documents (see Table 2). We will probably witness many different outcomes of changing technological leadership in the medium- and long-term.

Table 1: Patent Applications

| Patent Applications | 2007 | 2018 | 2019 | 2020 |
|---------------------|-----------|-----------|-----------|-----------|
| World Total | 1,850,000 | 3,325,400 | 3,224,200 | 3,276,700 |
| China | 245,161 | 1,542,002 | 1,400,661 | 1,497,159 |
| United States | 456,154 | 597,141 | 621,453 | 597,172 |
| Japan | 396,291 | 313,567 | 307,969 | 288,472 |

Source: WIPO (2009, 2019, 2020, 2021)⁶

Table 2: The Number of Citable Scientific Documents and Ranks

| 1996 | | | 2020 | | |
|------|--------------------|-------------------|------|--------------------|-------------------|
| Rank | Country | Citable Documents | Rank | Country | Citable Documents |
| 1 | United States | 350,258 | 1 | China | 744,042 |
| 2 | United Kingdom | 86,373 | 2 | United States | 624,554 |
| 3 | Japan | 89,430 | 3 | United Kingdom | 198,500 |
| 4 | Germany | 75,878 | 4 | India | 191,590 |
| 5 | France | 55,205 | 5 | Germany | 174,524 |
| 6 | Canada | 42,607 | 6 | Italy | 127,502 |
| 7 | Italy | 39,127 | 7 | Japan | 127,408 |
| 8 | Russian Federation | 32,243 | 8 | France | 112,838 |
| 9 | China | 30,741 | 9 | Canada | 110,247 |
| 10 | Australia | 24,754 | 10 | Russian Federation | 119,195 |

Source: SCImago⁷

In addition to the supply chain disruptions due to increasing freight costs and long delivery times driven by COVID-19, the recent Russia–Ukraine war makes the situation worse, especially in terms of energy and food value chains. Moreover, regarding the other conflicts such as the United States–China conflict over Taiwan, there may be more possible threats for the security of long GVCs.

The intense technological change especially in terms of the increasing role of robots, threatens employment in manufacturing industries. There is evidence of the negative impact of robots or automation on the employment of both developed and developing

⁶ [World Intellectual Property Organization](#) (WIPO), *World Intellectual Property Indicators 2009*; WIPO, *World Intellectual Property Indicators 2019*; WIPO, *World Intellectual Property Indicators 2020*; WIPO, *World Intellectual Property Indicators 2021*.

⁷ SCImago, "[SCImago Journal & Country Rank](#)", *SJR*, April 2022.

nations.⁸ Although countries are aware of the issue up to a point, it is not possible to considerably control the ongoing transformation. Factories can successfully produce the same amount of goods with much lower levels of labor compared to ten years ago due to increasing technological capacities of capital goods. There will be possible challenges driven by the differences in the priorities of firms in terms of profit seeking and the efforts of governments to avoid unemployment. Artificial intelligence, 5G, machine learning, big data, Internet of Things, and other new developments have potential to cause many economic and social changes in the long run.

In the long run, a trilemma awaits us: the sufficiency of world energy resources, climate change and the energy hungry-countries such as China and India. More energy consumption means the earlier extinction of energy resources. The further progress of societies requires more energy but brings more emissions. The increasing climate change deteriorates agricultural lands and increases immigration. Sustaining food security becomes much more difficult. Very big movements of human population can be only dealt with by careful planning and efforts by the majority of nations.

The increasing self-sufficiency and protectionism, on the one hand, and increasing needs for multilateral cooperation, on the other, may pose a further challenge for the international community. Nations must first meet their energy needs in order to ensure their sustainability. In this transition and energy crisis period, energy diplomacy is more important than ever. In the next section, we will elaborate on some issues in this context.

Increasing Importance of Energy Diplomacy through the Energy Crisis Era

Energy is now undoubtedly more important for the world than ever before. While the global energy demand is increasing rapidly, many targets are set for energy transition in order to reduce carbon emissions. Energy supply and prices directly affect the growth targets of countries. While the global economy and technological superiority are slowly shifting from the West to the East, the global tension evolving in the axis of the United States–China conflict reveals a globalization model in which energy is put at the center. Balances shaken by extraordinary situations such as the pandemic turn into the launchpad of a global economic model focused on green transition.

⁸ A. D. Kugler, M. Kugler, L. Ripani, and R. Rodrigo, [U.S. Robots and Their Impacts in the Tropics: Evidence from Colombian Labor Markets](#), *National Bureau of Economic Research Working Paper Series No: 28034*, 2020; Francesco Carbonero, Ekkehard Ernst, and Enzo Weber, [Robots Worldwide: The Impact of Automation on Employment and Trade](#), *International Labor Organization (ILO), Research Department Working Paper No: 36*, October 2018.

Of course, together with all these developments, the contraction in the hydrocarbon sector and the lack of investment reveal that there are inadequacies in meeting the demand caused by the economic growth following the pandemic. Many states that dream of an early green transition are waking up from their rosy dreams into an icy energy crisis. In this process, the international organizations that recommend not taking the discovered hydrocarbon resources into production bury their heads in the sand in the face of these events.⁹

While this is happening, Russia unexpectedly and irrationally invaded Ukraine in February 2022, which deepened the energy crisis, and the international system is heading toward an inextricable crisis. GVCs, logistics networks, financial cycles, and international trade are facing a major bottleneck. With each new statement and sanctions, Russia's relations with the United States and the EU are getting more strained, causing the energy flow to be more difficult, and the prices are now causing many energy-importing countries to reach a deadlock.

While many countries are crushed under the worry of recession with rising energy prices, production is shifting toward countries where energy is cheap, especially in sectors with high energy intensity. The process, which started with the coal crisis in the Asian markets in September 2021,¹⁰ affects the natural gas markets, and with the tense international system following the Russia-Ukraine war, natural gas and electricity prices have reached unmanageable levels, especially in the European markets.¹¹

The price scales, which test tens of times what they should be in the spot markets, seriously affect the newer members of the European Union due to their relative financial weakness compared to earlier members. Energy has special significance for the unity of the EU, since the current energy crisis may threaten the EU countries in terms of social security and economic contraction. While energy became such a strategic issue for the EU, the goal of achieving a market free of Russian gas (or at least reducing dependence on Russian gas) has shifted to a more concrete plan. In fact, the history of dependence on Russian natural gas for EU countries started long before the EU was established. Natural gas, which is a much more practical and cleaner energy type (compared to coal), has

⁹ IEA, [Net Zero by 2050: A Roadmap for the Global Energy Sector](#), *International Energy Agency*, May 2021.

¹⁰ M. Meidan, [China and the Energy Crisis: Still on Track for 30–60, Commentary, Italian Institute for International Political Studies](#), *ISPI (Italian Institute for International Political Studies)*, January 5, 2022.

¹¹ UN, [Global Impact of War in Ukraine: Energy Crisis](#), United Nations Global Crisis Response Group on Food, Energy and Finance, Brief No: 3, August 2022.

been imported from Russia by many EU countries for many years, without hindering industrialization and growth targets.

On the other hand, mostly since the Cold War period, European countries have been trying to create markets that are less reliant on Russian gas. However, this situation has never been easy to accomplish. Because Russian gas has often been the cheapest, easiest to access, and safest regarding the supply route (generally sustainable). Due to this, an effective policy cannot be carried out in this context. Moreover, we have to note that the nature of the gas market, which requires giant investments and climate-related policies, also affects decisions in this regard.

Therefore, the EU was usually following a confused policy, where it cannot completely agree on accepting or denying additional Russian gas imports. However, this situation seems to have ended with the Russia–Ukraine war.¹² The Russia–Ukraine war was indeed a painful turning point that demolished the diplomatic bridges between EU countries and Russia. In fact, even though they had harsh rhetoric against Russia (as a matter of policy), the EU leaders knew that it was not possible to eliminate Russian gas from their markets in a short time. However, this war has broken all the ongoing dynamics.¹³ Worsening sanctions, price cap (for Russian oil or gas) declarations, and planned sabotages to the Nord Stream 1 and 2 pipelines have greatly reduced the possibility of normalization of relations. For the winter of 2022–23, it can be estimated that, despite EU wishes, it will not be able to import additional Russian gas from the Nord Stream routes.

According to the long-term projections of the Turkish Energy Strategy and Research Center,¹⁴ it is obvious that the resources that can be procured from countries such as the United States, Norway, Qatar, Australia, Nigeria, Algeria, Libya, and Azerbaijan (as long as the technical capacities allow) will not be a solution for the EU. In addition, it can be estimated that the related possible resources cannot be considered a long-term solution in the price-cost-reserves triangle.

So, what can the EU do? It has suspended its green transformation goals, has condoned coal plants, has cut down trees for heating purposes, and has reintroduced nuclear and natural gas into the clean energy class. At this point, establishing an effective energy diplomacy and long-term macro policies are perhaps the most feasible solutions. A new

¹² Oğuzhan Akyener, *Black Sea 2022 – Energy Crisis: The Only Realistic Option for a Russian Gas-Free EU Turkiye Route* (Ankara, 2022).

¹³ Oğuzhan Akyener, *Black Sea 2022 – Energy Crisis: Worsening Energy Crisis in EU* (Ankara, 2022).

¹⁴ TESPAM, *World Energy Outlook 2100*, Turkish Energy Strategy and Policy Research Center (Ankara, 2020).

integrated route through Türkiye may be a long-term chance for the EU to reach a market free from Russian gas.

Türkiye's Strengthening Role for Being a Transit Country

Türkiye has been developing strategies to become an energy hub (specifically, a gas transit center) since the Nabucco pipeline project studies.¹⁵ In this context, there is no doubt that the possibility of connecting Türkiye's eastern and southern neighbors (which are rich in energy resources) with its western neighbors is emphasized. Undoubtedly, many technical, economic, political, and financial conditions must be realized simultaneously in order for these plans to come to life. From this perspective, the current energy crisis and the EU's more coherent attempts to reach a market structure free of Russian gas can be an important advantage for Türkiye to be an energy transit hub. In addition to this, such a route and solution model can be the most realistic option for the EU's energy security.

At this point, as a solution model, TESPAM's long-term projections were used. TESPAM (Türkiye Enerji Stratejileri ve Politikaları Araştırma Merkezi) founded a GIS-based (geographic information system) dynamic energy flow model in 2020. This model is currently available only for TESPAM's internal studies and analysis. Within this concept, all proved and declared reserves, economic, social, political properties of each country, and relevant markets are combined within a numerical and geographical approach. Through this model, TESPAM tries to estimate and project long-term energy demands, supply potentials, costs, tariffs, prices, and market conditions within the neighboring geography of Türkiye. In this regard, Iraq, East Med (Eastern Mediterranean), and Turkic countries' gas exports were modeled to be transported to Türkiye and the EU. The results show that this model can only be achieved in the long term, has a huge economic and political cost, and the possible gas transit via this route may not be as cheap as Russian gas (by evaluating the unit production and transportation costs). However, this seems the only realistic, sustainable, and applicable option for an EU that is not dependent on Russian gas (within the current dynamics).¹⁶ In this context, the EU's long-term gas demand and import scenarios (in 2050) can be observed in Figure 1:

- Romania will need an import volume of 6-bcma (billion cubic meter/year).
- Türkiye will need 80-bcma.
- Bulgaria will need 5-bcma.

¹⁵ T. Umucu, M. Altunisik, and M. V. Kok, "Turkey as a Major Gas Transit Hub Country", *Energy Sources Part A*, 34 (2012): 377–384.

¹⁶ TESPAM, *World Energy Outlook 2100*.

- Italy will need 90-bcma.
- The balloons on the map show the demand of the other European countries.
- Through the possible transit routes (pipeline infrastructure) with some additional investments, gas markets in Baumgarten, East Austria, or Italy can be used to supply some Western and Central Europe countries such as Germany, France, Belgium, the Netherlands, Poland, and the Czech Republic. Through this route an additional 40-bcma can be available (by evaluating the limitations through the technical constraints).¹⁷

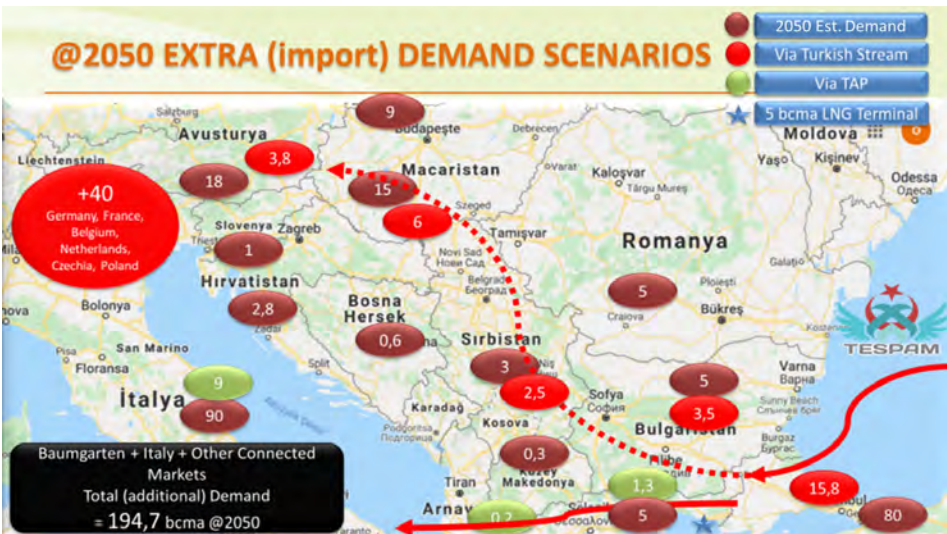


Figure 1: 2050 Gas Demand Projections in Some EU Markets¹⁸

As can be observed, Austria, Italy and other connected markets will be fed through a possible Turkish route. And the total reachable demand will be around 194.7-bcma in 2050 (without Türkiye).¹⁹ As to export potentials, Figure 2 shows the possible volumes of additional exports of due countries or regions in 2050.

This huge supply potential can be achieved only if the security concerns and the conflicts are solved and an investment environment is sustained. Moreover, this volume can be a real long-term solution for an EU free of Russian gas. If the EU will not make the effort to

¹⁷ Akyener, *Black Sea 2022 – Energy Crisis: The Only Realistic Option for a Russian Gas-Free EU Turkish Route*.

¹⁸ Ibid.

¹⁹ Ibid.

obtain this gas, we are sure that China is waiting (and making the investment) for all of the gas resources from this region (Turkic countries).²⁰

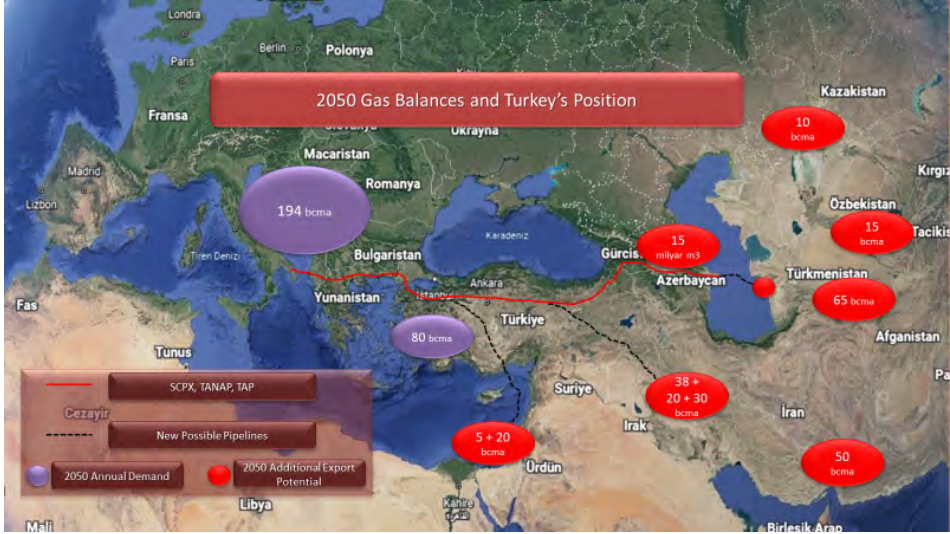


Figure 2: 2050 Gas Balances and Türkiye's Position²¹

East Med Gas Potential

Undoubtedly East Med has a very unique and strategic role in this model. That is, although export potential is not as high as the eastern regions, development capabilities and transportation costs make East Med preferred. On the other hand, existing political conflicts in the region worsen the situation. According to TESPAM's long-term projections, Israel and the Southern Side of Cyprus Island (SSCI) may have around 25-bcma gas export potential in 2050 (by accepting the limits of the current discoveries).²²

Note that there is not enough evidence and proven data regarding ENI's latest discovery in the SSCI, and declarations about the Cronos-1 were not taken into consideration.²³ In this regard, it can be analyzed that first, Egypt, being in a position to have the ability to export its gas from the existing LNG (liquefied natural gas) infrastructure, is out of the equation in all political discourse. Second, Israel has a roughly 5-bcma additional export

²⁰ Ibid.

²¹ Ibid.

²² Oğuzhan Akyener, "Future of Israel Gas Export up to 2050 & Türkiye", *Energy Policy Türkiye*, 2, no. 2 (2016): 15.

²³ Press Release, "Eni Makes a Significant Gas Discovery Offshore Cyprus", *eni.com*, August 22, 2022.

potential by analyzing the long-term sales possibilities. However, again to make such exports, Israel needs to find a reliable and economically feasible market. In addition to this, Israel also has possible new structures (interpreted in the seismic studies) waiting to be invested and tested, which can be accepted as new reserves.²⁴ This means, again, for Israel to find investors for these new projects, the country needs a possible export route.

There is an important volume of export potential in SSCI (around 18-bcma plateau rate). However, due to the existing conflicts, there will not be any real investments for the further development of these projects. Israel's additional export potential and the SSCI discoveries can be exported together, which means the total volume to discuss will be around a peak of 25-bcma. This is a good volume in comparison to the gas supply security concerns of the EU. This volume politically and economically can be transported to the EU through a route in Türkiye. Türkiye is the biggest, as well as a reliable, sustainable, and commercial gas market in the region (which also may be a more profitable option for the gas suppliers in the East Med). There are huge conflicts in the region, and the best solution can be achieved through Israel's and Türkiye's integrated approaches.

The increasing cooperation between Türkiye and Israel may lead to the resolution of many regional conflicts from the Cyprus conflict to the Syrian Civil War and other regional conflicts. Energy and water problems on the whole island of Cyprus may be resolved with Türkiye's help. The current political climate can be used as leverage to solve all these blocked issues in the region, and gas trade opportunities can be used as a leverage point for Western countries.²⁵

Importance of Türkiye–Israel Collaboration

The current situation clearly reveals the fact that energy can be used as a tool for resolving regional conflicts. Moreover, the current situation also shows that thanks to the ability of Türkiye and Israel to act together in this context, they can find many opportunities and support for the resolution of the relevant regional conflicts. In this context, it has become more possible to create a basis for the attention of the international public and the related problems to be resolved more quickly through fair and pragmatic means.

While the world is going through a great crisis and chaos and while the EU is experiencing such difficulties for the first time, further tensions in the Eastern Mediterranean will not benefit anyone. Energy-oriented steps by Türkiye and Israel will not only benefit the

²⁴ Israel's Ministry of Energy, [Gas Fields & Exploration Licenses Offshore Israel](#), June 2020.

²⁵ Oğuzhan Akyener and Abdullah Altun, [Israel Gas Export Potential, Türkiye and Regional Dynamics](#), *Tespam*, October 5, 2022.

interests of the two countries but also contribute to the development of the possible resources of Lebanon and Syria in the long run. On the other hand, thanks to the abovementioned possible energy corridor (between Israel and Türkiye), the resources located in the south of Cyprus could also be brought into the economy and used for the welfare of the island's rights as well as all relevant markets.

It is no wonder that all global parties in the current situation cannot formally accept the existence of two nations and two states on the island of Cyprus. However, the synergy to be obtained from the cooperation and mutual win-win environment (after a possible energy corridor) can be used to change these kinds of existing conflicts. Otherwise, conflicts and further tensions in the region will continue to harm the interests of Israel, Türkiye, the EU, and the United States. Strategizing against Türkiye (a NATO member!), with harsh rhetoric and hypocritical attitudes, would mean increasing the dominance of countries such as Iran and China (which the United States and other Western allies perceive as threats) in the region. That is why it would be appropriate to follow more sincere policies in understanding these issues.

While energy has become such an important issue in this process, it would be beneficial to initiate an energy-centered cooperation process, even if the current problems are suspended, and to review the solution models later, taking into account the gains achieved in this context. For this reason, Türkiye–Israel cooperation and an energy diplomacy model that can be at the center in this context are very important for ensuring regional peace and for the long-term solution of conflicts.