UNSETTLED CONFLICTS: HOW WILL THE RUSSIAN-UKRAINIAN WAR RESHAPE THE EASTERN MEDITERRANEAN?

الشرق للأبحاث الاستراتيجية

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ANALYSIS

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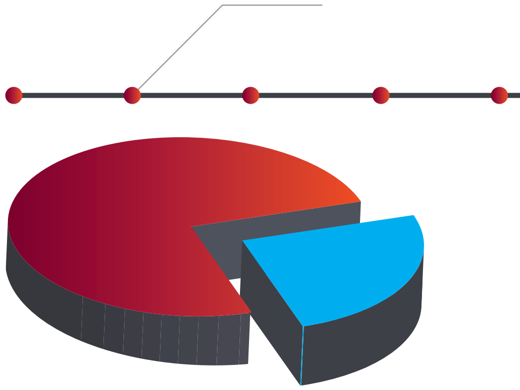

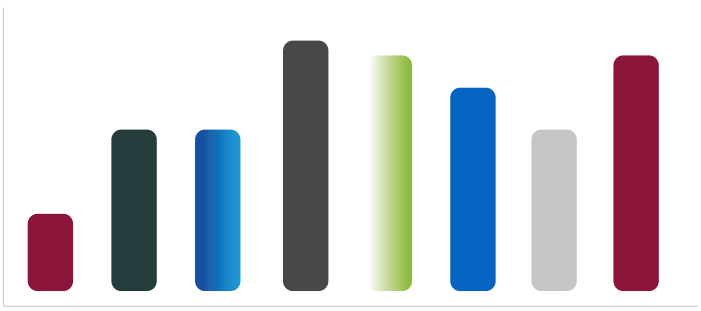

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Executive Summary

The global energy map irreversibly changed with the Russian invasion of Ukraine as the European Union scrambled to find alternative sources to substitute Russian gas. The eastern Mediterranean region has especially acquired significance due to its huge reserves discovered in the first decade of the twenty-first century. This urged the majority of Eastern Mediterranean countries to set ambitious plans to invest in the exploration, production, and transportation of hydrocarbons and achieve rapid economic and geopolitical gains over the short and medium term. Moreover, the Russian-Ukrainian war increased the geopolitical importance of some countries of the Eastern Mediterranean, especially Turkey and Greece, due to their location as the southern eastern gateway to the European continent and the only outlet to the Black Sea.

As a result, the tensions between eastern Mediterranean countries have remarkably increased over the past few months. For instance, the disputes between Turkey and Greece over their maritime borders and exploration plans intensified, the relationship between Egypt and Turkey became further complicated in the wake of the latter's agreement with Libya on oil and gas exploration, and Lebanon and Israel held tense negotiations to demarcate their maritime borders. In the foreseeable future, it is likely that competition over energy sources will continue to be the main source of instability in the region.

The European quest for independence from Russian gas

Over the past two decades, Russia has exploited its huge exports of natural gas to Europe as a geopolitical weapon and a tool of pressure during its repeated disputes with Ukraine in 2006 and 2009, and during the Russian military intervention in Crimea in 2014, by threatening to cut off or reduce natural gas supplies to other countries.

Despite the policies that the European Union has sought to adopt in the past years to reduce dependence on Russian gas through the diversification strategy[1] announced in 2014, the volume of European dependence on Russian gas reached to fulfill about 40% of the continent's needs in 2021.[2] On the contrary, Germany increased its imports of Russian gas to the extent that it has become the largest consumer of Russian gas in Europe, obtaining 55% of its needs from Russia.[3] Furthermore, Berlin did not abandon the Nord Stream 2 pipeline project, which connects Russia and Germany directly across the Baltic Sea, until shortly after the Russian invasion of Ukraine.

Consequently, before it invaded Ukraine in February 2022, Russia continued to use its strongest trump card by creating a severe energy crisis within Europe. It reduced gas supplies to the continent under allegations of maintenance work and technical problems. From that preemptive step to the invasion, Moscow aimed to undermine any European efforts to impose sanctions on Moscow after the latter's military intervention in Ukraine by threatening to cut off its gas, and thereby cause large-scale economic and social crises for the European Union.

The energy crisis in Europe: No short-term solutions

At the beginning of the Russian-Ukrainian war, Europe decided to hasten its moves to end dependence on Russian gas. Last May, the European Commission published new strategies that set the course for the European Union to become independent from Russian fossil fuels by 2027 (REPowerEU).[4] However, a number of challenges prevent this goal from being achieved in the short term, such as:

First, Europe will not be able to achieve its strategy without receiving huge quantities of liquefied gas (LNG) coming via sea tankers from the major LNG exporters. Nevertheless, Europe currently lacks the required infrastructure, as it only has 24 stations[5] capable of receiving liquefied gas and re-gasifying it (Regasification Plant) – a number that only meets half of the European Union's gas needs.[6] As a result, most European Union countries are accelerating their steps towards building floating terminals to receive liquefied natural gas (FSRU), which take less time to construct in comparison to ground stations. Germany alone, after issuing a law for the urgent development of liquefied gas infrastructure,[7] plans to construct five floating terminals and three ground terminals.[8] However, according to forecasts,[9] Europe's LNG infrastructure will not be able to fully meet the continent's gas needs before 2030.

Secondly, the excess export capacity of the global LNG markets will remain limited until the middle of the current decade, for two main reasons:

(1) Most of the export capacity of the major global LNG exporters is already tied to long-term contracts, especially with the Asian market, which is the main growing market for LNG. For example, Qatar - the world's first exporter of liquefied gas - has committed about 70% of its exports in long-term contracts with Asian customers, which means it will be able to supply Europe at present with only about 10% to 15% of its total exports,[10] at least until it completes its expansion works in its northern field in 2027.[11]

(2) The earliest tangible increase in global production of liquefied gas will not be before the beginning of 2025, as increasing the production of natural gas requires investments that take several years. For example, the United States is currently establishing three liquefaction stations for natural gas on the Gulf of Texas coast. These stations are expected to be operational at the beginning of 2025 and to contribute to the export capacity of the global liquefied gas market by about 5.7 billion cubic feet per day.[12] Moreover, one of the largest global liquefaction stations that Russia is building in the Arctic (Arctic LNG 2) was

not ready by the end of 2022 as planned,[13] due to Western sanctions and the withdrawal of all foreign companies from this giant project.

Europe reconsiders the value of the Eastern Mediterranean

Moscow has maintained its pressure on the European Union by gradually reducing gas exports to reach only 9% of the continent's gas needs by the end of last September,[14] compared to 40% last year. The Russian gas cuts were directly reflected in energy prices in Europe, which multiplied 10 times compared to average prices over the past decade.[15] This massive inflation of prices negatively affected social stability and prompted European governments to direct hundreds of billions of dollars to subsidize the affected companies and families. For example, Germany announced a €200 billion emergency plan to mitigate the impact of higher energy prices on consumers and factory owners. [16]

As a result, Europe moved in two parallel paths: the first in the near term is to reduce the risks of energy shortages in the coming winter (2022-2023), which the European bloc has come closer to achieving to a great extent, as it has been able to reach gas storage levels to limits that would be relatively sufficient to secure gas for its consumption in the coming winter months.[17] However, the greatest threat will remain in case Russia decides to cut off all of its gas supplies to Europe during the winter season. The second is to make gas deals and develop its infrastructure in the medium and long term. In this context, the European Union and its governments concluded deals[18] for additional quantities of gas in the coming years with Qatar, America, Norway, Algeria and Azerbaijan. The European Union also looked toward the eastern Mediterranean region to become one of the most reliable places to secure gas supplies in the coming period.[19]

Demarcation of the maritime borders between Lebanon and Israel... Complicated negotiations and an exceptional agreement

The growing European interest in gas reserves in the Eastern Mediterranean region prompted Israel, which possesses huge gas reserves in the Leviathan and Tamar fields, to take serious and urgent steps to exploit the opportunity,[20] through two main tracks: the first aims to maximize Israeli gas production by attracting and encouraging international energy companies to invest in hydrocarbon exploration and production. The second is to increase Israeli gas exports to the European Union by finding other means to export gas to Europe besides the current system that liquefies it in the two Egyptian gas liquefaction stations at Idku and Damietta.

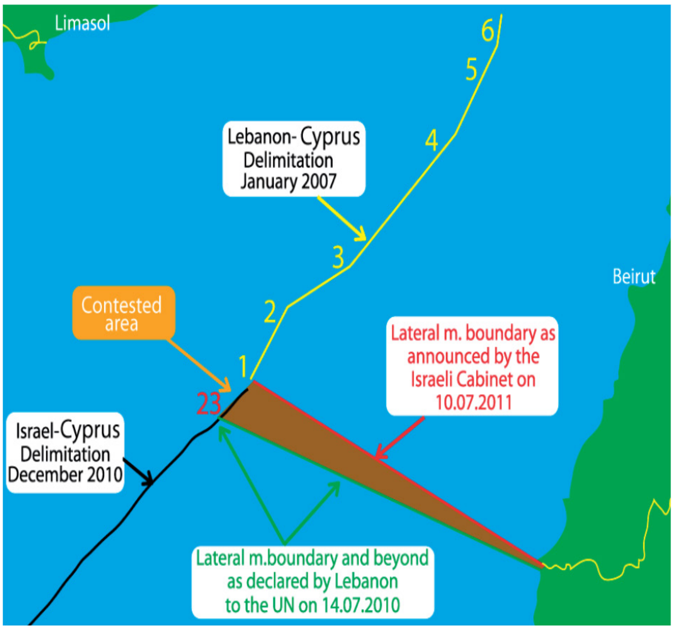
The Israeli efforts to maximize production and increase natural gas exports seek to make Israel one of the alternatives that Europe will rely on to detach itself from Russian gas over the next few years. This will give Israel a foothold in the new energy map that is taking shape in Europe and strengthen its influence within the European Union.

Lebanon, which imports all of its energy needs, is facing a severe electricity crisis this year, as most Lebanese neighborhoods depend on costly private generator companies.[21] Despite Lebanon's endeavor to find an urgent solution to its electricity crisis through a gas deal with Egypt and an electrical interconnection project with Jordan, neither of the two deals has yet to start implementation due to financing obstacles – a fact that contributed to exacerbating the electricity crisis and made it one of the main challenges facing the caretaker government.

These developments were the main motives for both Lebanon and Israel to move forward with negotiations to demarcate the disputed maritime borders.[22] Moreover, the political crises in both countries also played a significant role.[23] In Lebanon, President Michel Aoun - whose non-renewable term ended on October 31- sought to achieve success in the energy issue before leaving power, especially given the repeated failure of the Lebanese parliament to elect a new president, and the growing expectation of a presidential vacuum. Likewise, in Israel, Prime Minister Yair Lapid tried to claim a tangible achievement to raise the likelihood of victory before the holding of elections- the fifth in less than four years -, an attempt that ultimately failed.

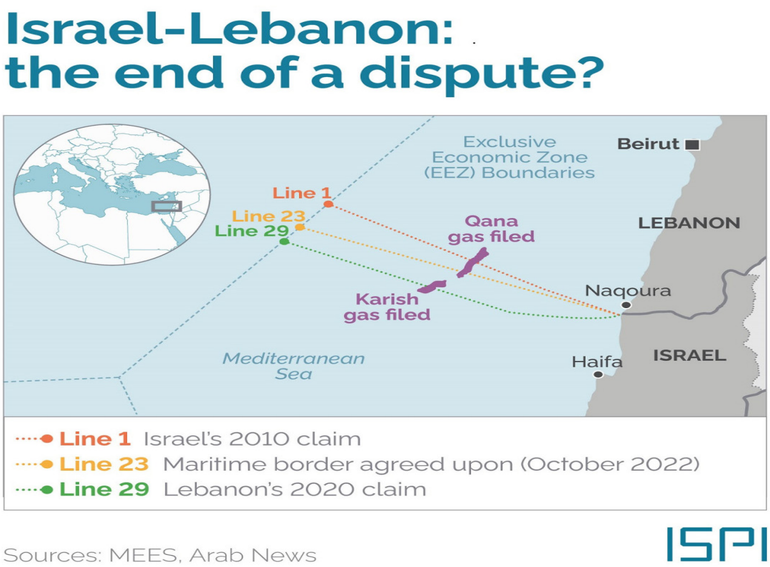
Disputed maritime boundaries for a decade

The dispute over maritime borders between Lebanon and Israel dates back to 2010 when Lebanon submitted a request to the United Nations to define its maritime borders (EEZ) with Israel.[24] From the Lebanese perspective, its maritime borders with Israel begin with a line that starts from Ras al-Naqoura - the town that defines the coastal land borders between Lebanon and Israel - and extends 133 km in the Mediterranean waters to point 23, in what is defined as Line 23. Meanwhile, Israel announced in mid-2011 that its maritime borders with Lebanon starts from Ras al-Naqoura but ends at the northeast of point 23 by about 17 km, in what is defined as Line 1. The two countries' differing perceptions have resulted in the existence of a small triangle of disputed waters covering an area of about 860 km2. See map number (1).



Map No. (1): The triangle in brown shows the disputed water area between Lebanon and Israel[25]

The United States has played a mediation role since 2012 to reach a settlement of the maritime borders between Lebanon and Israel, but its efforts were not successful. In fact, the crisis between the two countries flared up again in 2018, after the French company Total, in partnership with the Italian Eni and the Russian Novatek companies, obtained the exploration rights for oil and gas in the Lebanese "Block 9" area, which extends into the disputed waters. The renewed dispute over the maritime borders between the two sides caused Total to postpone the start of work in "Block 9," which has yet to commence. The conflict did not stop there, as Lebanon changed its position at the end of 2020 during the negotiations that former US President Trump tried to accomplish before leaving the White House and demanded a larger economic zone by changing point 23 to point 29 in what is known as Line 29.[26] This led to an increase in the disputed area to about 1430 km2, see Map No. (2).



Map No. (2): shows the expansion of the economic zone that Lebanon 'claimed' in 2020[27]

The way to an exceptional agreement

Consequently, while Israel was racing against time to start producing gas from the Karish field and increase its production and exports to a gas-hungry Europe, Hezbollah (a Lebanese armed movement supported by Iran) threatened to attack the Karish field if the Lebanese demands related to the demarcation of maritime borders were not met. Indeed, to show how serious it was, the party sent drones to fly over the floating production platform in the Karish field.[28]

Israel had no options but to postpone production operations until reaching an agreement with Lebanon, which was announced in mid-October through American-mediated negotiations.[29] According to the agreement, the maritime borders that were agreed upon between the two sides are completely identical to the borders that were claimed by Lebanon at the beginning of the conflict in 2010 (Line 23),[30] and in a more precise sense, the new borders make the southern part of the Lebanese Block 9 completely located within Lebanese waters. However, the agreement also places the entire Karish field within Israeli waters.

Regarding the Lebanese "Qana" field, which is located in the "Block 9" area, according to the studies carried out by Total, the main operator of the field, the field contains large reserves of natural gas.[31] As the bulk of it falls within Lebanese maritime borders, the agreement states that Total will carry out research and exploration work in the "Qana" field for the benefit of Lebanon, provided that Israel will receive a percentage of the proceeds of any future output from the field.

Israel estimates the part of the "Qana" gas field that extends within its maritime borders at about 17% of the total volume of the field.[32] Nevertheless, this percentage will remain subject to increase, decrease, or even non-existence at all, based on the final results that Total will reach after starting work in the field. This part of the agreement is seen as the most prominent challenge for both the Lebanese and Israeli sides, given that the share Israel is supposed to obtain is unidentified and linked to the results that Total will later announce. Therefore, this part of the agreement remains a factor that may re-ignite conflict between the two countries.

Beyond demarcation of maritime borders: Achievement of economic gains for Lebanon and security objectives for Israel

It should be mentioned that Lebanon's gains from the maritime border demarcation agreement with Israel are primarily economic in nature. This is because the size of revenues that Lebanon is likely to obtain in the event that natural gas reserves are found in the

Qana field, the first gas field in a country that imports all its energy needs, will significantly contribute to solving the electricity crises that Lebanon has been suffering from for years. Also, the economic gains that are likely to be achieved for Israel through this agreement cannot in any way be overlooked. Although these gains appear at first glance to be limited in the short term, given that the agreement will allow starting operation at the Karish field, whose reserves may not exceed 4% of the Tamar and Leviathan fields' gas reserves - at the same time, the agreement will attract international energy companies to pump investments in new areas in favor of Israel, which may result in the discovery of huge reserves of natural gas. [33]

In comparison, Israel's main gain from this deal is manifested in security gains, which involves securing its vital interests in the Mediterranean waters and enhancing stability to attract more investments for the prospecting and exploration of oil and gas. Thus, it seems that Israel, which has suffered in the past from the Lebanese Hezbollah's threats to target its gas facilities in the Mediterranean waters, has finally obtained implicit guarantees that the armed group will not harm its infrastructure in the future, through its approval of the maritime border demarcation agreement.[34] Moreover, the agreement means that Hezbollah no longer holds the same card it used in the past of threatening to target Israeli gas installations, as Lebanon will also in the short term possess gas facilities, which Israel itself could threaten these facilities in the event that Hezbollah threatens the Israeli gas infrastructure once again.

However, it may be difficult for this agreement to act as a guarantor of de-escalation of tensions between Israel and Hezbollah. In fact, the broader context of Israel's regional crises – especially amid Iran's continued development of its nuclear infrastructure and the poor prospects for reaching a nuclear agreement between the United States and Iran soon – could lead to an exacerbation of tensions between Israel and Iran at any time, which means that the potential for future hostilities between Hezbollah and Israel will always exist.

On the other hand, the Lebanese side was keen on various occasions to stress that the agreement does not constitute official recognition of Israel or normalization of relations with it. Indeed, the course of negotiations did not involve any direct contacts between the two sides, and the agreements and transactions around the Qana field in the future will only be between Total and Israel, without the Lebanese side having any direct contacts with Israel. In the same context, it is not expected that such cooperation between the two sides will extend beyond the area of gas extraction from areas that had previously been in dispute. Rather, disputes may renew once again over the agreement after verification of gas discoveries in the Qana field and the size of their expected financial revenues.

Accordingly, it can be said that the agreement does not necessarily express any prospects for the start of diplomatic relations between Lebanon and Israel in the short term. Rather, the agreement may represent an exceptional period of time in which both parties seek to pursue their interests without conflict.

Turkey and Greece: An expanding conflict zone

The Russian-Ukrainian war urged Washington to review its foreign policy and to re-direct its focus to several regions around the world after previously focusing exclusively on confronting China's rising influence in the Indo-Pacific region. In this context, Washington has re-engaged more in Southeastern Europe and the Black Sea, which recently gained vital strategic importance for both Washington and its allies in the North Atlantic Treaty Organization (NATO) in light of their efforts to confront Russian threats.[35] As a result, the Russian invasion of Ukraine, as well as the Western interest in Southeastern Europe and the Black Sea, has enhanced the geopolitical importance of both Turkey and Greece due to the role that the two countries can play in ensuring regional security and achieving geostrategic balance against Russia.

Washington re-engaging in the Black Sea

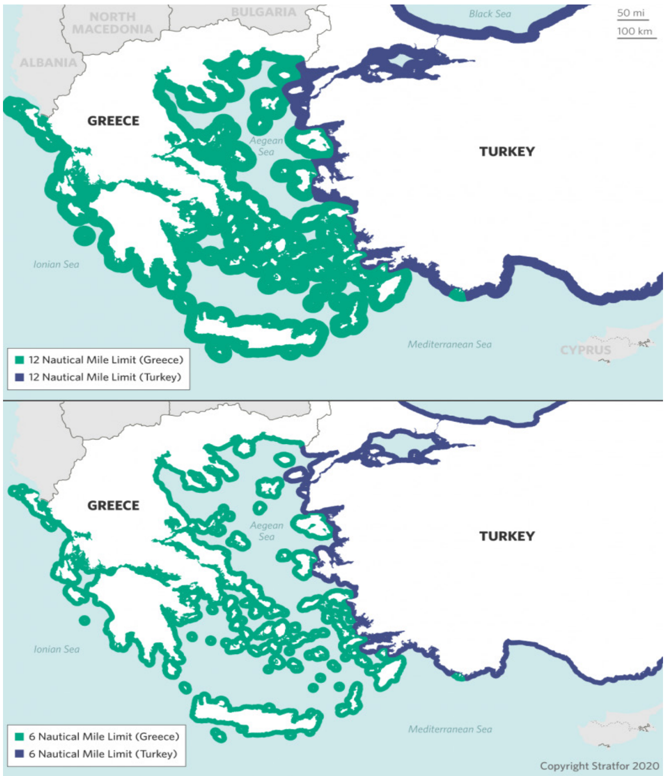
Despite the tense relations between the United States and Turkey for years due to the latter's growing relations with Russia, which culminated in Ankara's purchasing of the Russian S-400 air defense systems, the recent developments after the Russian invasion of Ukraine prompted Washington to mend its relations with Turkey, hoping that Turkey can act as a counterbalance to Russian power in the region,[36] with the effective participation of NATO. To express Washington's efforts to strengthen its relationship with Ankara, it canceled the special conditions related to the sale of the F-16 jets to Turkey, which had caused the deal to be suspended for nearly a year.

Within the framework of the American efforts to strengthen its military and strategic presence in the Southeastern European region, as well as in the context of the increasing military cooperation between the United States and Greece over the past few years, Washington is seeking to transform the Greek port of Alexandroupoli on the Aegean Sea (the port is located in Northeast Greece close to the Turkish border) to a joint naval base with Athens. This step, which was announced last September,[37] aims to make the port, after its deepening and expansion, suitable for receiving American destroyers of the "Arleigh Burke" class, which are equipped with guided missiles. Moreover, the Greek port will provide Washington with a strategic alternative in case the mobilization of its forces and military equipment to the Black Sea through the Turkish straits of the Dardanelles and the Bosphorus is disrupted, as the Alexandroupoli port will serve as a gateway to a land corridor that allows US forces to reach eastern Europe.

Revival of the Turkish-Greek conflict over the Aegean Sea

On the other hand, these developments ignited tensions between Turkey and Greece once again over several issues related to the Aegean Sea. At the forefront of these issues comes Greece's arming of the islands in the Eastern Aegean Sea, most of which are located near Turkey's coastline. According to the 1923 Lausanne Treaty, the 1930 Friendship Pact, and the 1947 Paris Peace Treaty concluded between Turkey and Greece, the Aegean Islands fall under Greek sovereignty, provided that they remain demilitarized and devoid of military forces.

Following the Russian invasion of Ukraine, Greece resumed its decades-long attempts to arm the Aegean islands, as Athens deployed American-made armored vehicles on the islands of Samos and Lesbos.[38] The crisis of arming the islands has once more revived the disputes with Turkey over the maritime borders of the islands,[39] which Greece demands should be expanded to a distance of 12 miles from the shores of the Aegean Islands instead of the current 6 miles, according to the United Nations Convention on the Law of the Sea (UNCLOS)[40] to which Greece, but not Turkey, is a signatory. (See Map No. (3)). The Greek demands would grant Athens almost complete control over the air and sea space in the Aegean region and prevent Turkey's access to the Aegean Sea except through the permission of the Greek authorities – a situation that Ankara categorically rejects. Ankara has reaffirmed its commitment[41] to the decision taken by the Turkish Parliament in the mid-1990s that any attempt by Greece to extend its maritime borders to a limit of 12 miles will be considered as a declaration of war.



Map No. (3): The upper part shows the territorial waters of Turkey and Greece if 12 miles from the shores of the Aegean Islands are counted, while the lower part shows the current situation of the territorial waters with the calculation of 6 miles from the beaches[42]

The dispute between the two sides did not stop at hostile statements or diplomatic escalation by summoning ambassadors, but also extended to the airspace of the Aegean Sea,[43] where Athens jammed Turkish fighters while they were flying over international space of the Aegean Sea more than once. On the other hand, Turkish military aircraft have intensified their flights in the airspace over which Athens claims sovereignty, for Ankara to express its rejection of the measures and practices that Athens is trying to impose in the Aegean region.

The European energy crisis increases the competition between Ankara and Athens

The energy crisis in Europe has become another reason behind renewed conflict between Turkey and Greece, as both countries have high ambitions to benefit from the European policies to dispense with Russian gas. In the short term, each party aims to become a center for natural gas supplies to south-eastern Europe, which gives each country economic revenues and geopolitical gains with Europe. In this context, Greece plans to construct 5 floating stations to receive liquefied gas,[44] and an agreement has also been reached to construct a gas pipeline linking Greece and Bulgaria (IGP) to supply the latter with natural gas. [45]

Meanwhile, Turkey, in a bid to strengthen its position as a regional energy center[46] and a route for natural gas to European markets through the "TANAB" and "TurkStream" pipelines, seeks to receive more gas[47] from several countries such as Turkmenistan, Iraq and Iran to transport it to Europe. (See Map No. (4)). Ankara also plans[48] to establish an international storage center for natural gas, in response to the Russian proposal for Turkey to adopt a regional supply center for Russian gas exports to Europe.[49] In addition, there is a plan to build a marine gas pipeline from Israel to Turkey. Although the line is the shortest and least expensive means to deliver Israeli gas to Europe, the slow return of relations between Turkey and Israel, as well as the Turkish-Cypriot disputes over the maritime borders[50] may delay the start of the project for the foreseeable future.

Map No. (4): Shows the "Tanab" and "TurkStream" pipelines[51]

Turkish and Greek aspirations are also intensifying research and exploration operations for oil and gas in the eastern Mediterranean. In April, Greece announced the acceleration[52] of the hydrocarbon exploration program in the Mediterranean waters. On the other hand, last August, Turkey sent a new ship for research and exploration off its southern coast, after a hiatus of more than two years.[53]

But the most crucial step in this context was the joint agreement announced by Turkey and Libya last October, which once again sparked[54] conflict between Turkey and Greece over the demarcation of maritime borders and the exclusive economic zones (EEZ) in the Eastern Mediterranean.[55]

Greece and Egypt reject the recent agreement signed between Turkey and the Libyan government.[56] For Greece, the agreement allows Turkey to impose its vision of its maritime borders in the eastern Mediterranean and gives it the right to explore the south-eastern region of the Greek island of Crete, which is disputed between Greece and Libya. The Egyptian rejection, meanwhile, can be attributed to two main reasons: First, to show its commitment to support its allies in the Eastern Mediterranean (Greece, Israel and Cyprus), especially since the attempts to normalize relations between Egypt and Turkey have not concluded in tangible results. The second and more important reason is related to Egypt's fears of the increasing Turkish influence in Libya.

Given Turkey and Greece's long history of crises and their success in avoiding the eruption of military conflict between them for decades, it is unlikely that the current tensions between the two countries will develop into a military confrontation, especially as Washington and Western powers are very keen to avoid any crises that may affect the cohesion of NATO in the face of Russia. However, the challenges imposed by the Russian-Ukrainian war, whether those related to the development of military cooperation between Greece and America and the growing Turkish military capabilities or those related to the efforts of the Turkish and Greek sides to expand hydrocarbon research and exploration in the Eastern Mediterranean and develop the infrastructure for transporting gas to Europe are expected to fuel the conflict between Ankara and Athens in the short and medium term.

Conclusion

After the Russian invasion of Ukraine, the natural gas reserves in the Eastern Mediterranean became a focus of increasing interest from the European Union, as one source of strategic gas supplies that could contribute to alleviating the energy crisis in the short term, as well as one source that could help achieve the European strategy of becoming independent from Russian gas in the medium term.

European interest increased the aspirations of the Eastern Mediterranean countries, starting from Egypt and Israel, which concluded a deal to supply the European Union with liquefied gas, in addition to the plans of both countries to increase their exports through projects for marine pipelines or floating liquefaction stations; moving to Cyprus, which is exerting serious efforts to complete the development of the "Aphrodite" field as soon as possible, ending with Turkey and Greece, each of which seeks to position itself as a carrier of natural gas to the European bloc.

These developments indicate that the Eastern Mediterranean region will witness fierce competition for exploration and drilling for oil and gas, and over the construction of the necessary infrastructure for their exportation. With highly contested maritime borders across the Eastern Mediterranean, the potential for conflict over energy resources in the near term is expected to remarkably increase.

Over the past two years, Ankara has sought to restore relations with Egypt and Israel with the aim of preventing the formation of a regional alliance against it in the Eastern Mediterranean, and thus preventing the transformation of its crises with Greece and Cyprus into a crisis with a multilateral regional alliance. However, the continuation and flare-up of tensions between Turkey and Greece at the present time, and the disruption of the normalization process of the Egyptian-Turkish relations, as well as the political instability in Israel due to fragile coalition governments that make it difficult to build coherent relations with Ankara lead to the persistence of tensions in the region.

On the other hand, the United States' decision to withdraw its support for the EastMed pipeline project, which was supposed to supply Europe with Israeli and Cypriot gas, reflects Washington's decreasing interest in the Eastern Mediterranean region. Rather, the US is prioritizing its competition with China and the Western conflict with Russia. More importantly, Washington has become one of the main competitors for exporting liquefied gas to Europe and is no longer interested in developing the energy infrastructure of the Eastern Mediterranean countries as much as it is concerned with strengthening its own control over the liquefied gas markets in Europe. As a result, the US desire to develop joint energy projects in the Eastern Mediterranean is weak – a fact that will probably undermine any project for joint cooperation between the countries of the region.
Given that the Eastern Mediterranean region is politically unstable due to many long-term conflicts, any permanent and comprehensive cooperation plans between regional countries will face serious challenges. In addition, the Russian-Ukrainian war contributed to rising tensions in the Eastern Mediterranean region, ending the short period of de-escalation that the region has witnessed over the past two years.

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