



# TURBULENCE IN THE EASTERN MEDITERRANEAN

GEOPOLITICAL, SECURITY AND ENERGY DYNAMICS

# TURBULENCE IN THE EASTERN MEDITERRANEAN

GEOPOLITICAL, SECURITY AND ENERGY DYNAMICS

PUBLISHED BY

**The International Institute for Strategic Studies**

ARUNDEL HOUSE | 6 TEMPLE PLACE | LONDON | WC2R 2PG | UK



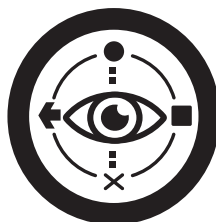




In recent decades, the Eastern Mediterranean basin has emerged as a strategic flashpoint. Historical grievances, regional conflicts, maritime disputes, defence-modernisation drives, rivalry over energy resources and export routes, and worsening transnational threats cyclically come to a head to produce geopolitical ripple effects. The vast imbalance of power between the various players, the relevance of Mediterranean energy deposits since Russia's war in Ukraine, and the renewed interest of major external powers have inflamed dormant fault lines and fuelled active battlefields. No single player, or set of players, appears able to dominate this space. Instead, its mix of powerful and weak states, as well as non-state armed groups of varying strength and ambitions, guarantees constant realignments, brinkmanship and competition.



(top to bottom) The head of the Presidential Council of Libya, Mohamed al-Menfi (R), attends the 31st Arab League summit in Algiers, Algeria on 2 November 2022; naval ships are seen during the second part of a distinguished observers day for the *Sea Wolf* military exercise on 23 May 2017; Greek Prime Minister Kyriakos Mitsotakis (C), his Israeli counterpart Benjamin Netanyahu (R) and Cypriot president Nicos Anastasiades attend the signing of an agreement for the EastMed Pipeline project in Athens on 2 January 2020. (Photos: Libyan Presidential Council/ Handout/Anadolu Agency; Aris Messinis/AFP; Ahmet Izgi/Anadolu Agency via Getty Images)



#### SECURITY OUTLOOK

The Eastern Mediterranean, located on NATO's and the European Union's southern flank, is home to several active and frozen conflicts, all of which appear intractable and many of which attract external interest. This instability drives migration and terrorism, which in turn have the potential to adversely affect the domestic and regional politics of European states.



#### GEOPOLITICAL LANDSCAPE

Geopolitics in the Eastern Mediterranean is dominated by Türkiye's assertive posture, big infrastructure and energy projects, and relationships with Western partners and allies.



#### ENERGY AMBITIONS

Major connectivity and energy projects are expected to transform the geo-economics of the Eastern Mediterranean. Every country in the region is currently manoeuvring to position itself as a node in potential corridors linking Asia and Europe through the Middle East. Every country, moreover, is worried about being bypassed.



#### DEFENCE TRENDS

Defence cooperation has thickened links between countries, but it has not translated into formal alliances. It remains inconsistent and shallow, with high levels of distrust and misaligned objectives and capabilities hampering ambitions for cooperative security.



MAP 1: CONFLICTS AND MILITARY INTERVENTIONS IN THE EASTERN MEDITERRANEAN AS OF OCTOBER 2023



**Conflict type**

- Domestic insurgency
- Internationalised civil war
- Inter-state or internationalised conflict
- Inter-state conflict and occupation

**Level of conflict intensity as of October 2023**

- Frozen
- Low
- Low-to-medium
- Medium
- High

- Foreign intervention
- Authorised or sovereign foreign military presence
- Prominent non-state armed groups

- Greece
- Iran
- Israel
- Russia
- Turkiye
- UK
- US

Source: IISS analysis

# INTRODUCTION

Since the mid-2000s, the Eastern Mediterranean basin – made up of Cyprus, Egypt, Greece, Israel and the Palestinian Territories, Lebanon, Libya, Syria and Türkiye – has emerged as a key arena in which global geopolitical trends play out. In the past two decades, its mixture of powerful and fragile states, combined with its geographic position between troubled regions and stable ones, has drawn considerable regional and global interest.

As a result, over the last two decades the Eastern Mediterranean basin has been:

- the location of major, complex civil wars and inter-state conflicts, none of which has been resolved and all of which retain significant potential for flare-ups;
- a prime arena for geopolitical and ideological competition since the Arab Spring in 2011;
- the conduit through which the externalities of Middle Eastern and Sahel instability and conflict, namely terrorism and migration, have reached and destabilised Europe;
- a space marked by political and security vacuums since the United States' retrenchment from the Middle East;
- a testing ground and an opportunity for Russia's global resurgence and its renewed challenge to the West;
- a recipient of Chinese investment in infrastructure through its Belt and Road Initiative (BRI);
- the area that saw the emergence of two revisionist global middle powers, Türkiye and Iran;
- a region where the Arab Gulf states have projected power in their pursuit of global influence;
- a prospective, yet contested and tentative, pathway for new, competing intercontinental energy and geo-economic corridors.

These evolutions in the geopolitical and energy landscape have catalysed significant interconnections among regional players in recent years, such as the formation of minilaterals grouping local powers. The search for regional security partners and the desire to position themselves as energy export hubs to Europe (for both gas and, in the longer term, green energy) has motivated all the key players, namely Egypt, Greece, Israel and Türkiye.

Nevertheless, these states' ambitions continue to be hamstrung by their failure, to date, to achieve much-needed economic integration, connectivity or stable geopolitical partnerships. There is a notable contrast between the constant – at times frenetic – commercial and political diplomacy under way across the region and the lack of tangible, sustainable institutional outcomes.

The International Institute for Strategic Studies (IISS) has conducted a comprehensive two-year study of the Eastern Mediterranean's political, security and energy landscape. Forthcoming in 2024, the Strategic Dossier *Turbulence in the Eastern Mediterranean: Geopolitical, Security and Energy Dynamics* provides a unique and timely survey of the region which describes and deciphers its power dynamics and geo-economics. Drawing upon original data on defence, security, conflict, infrastructure, economics and energy, the study identifies risks and evaluates prospects of relevance to both policy-making and corporate contexts.










The study seeks to answer the following questions: How great is the potential for inter-state conflict in the region? What are the ambitions, anxieties and capabilities of the various local players? Can energy serve as a basis for cooperation or, conversely, be a cause for war? Could regional minilateral groupings evolve into a security architecture? What are the opportunities and risks for external powers?

Surveying the Eastern Mediterranean as a region with a geopolitical logic of its own – the product of a long history of social, commercial and political exchanges – in which energy ambitions, regional conflicts and worsening transnational threats cyclically come to a head, the following takeaways stand out.

THERE IS A NOTABLE CONTRAST BETWEEN THE CONSTANT – AT TIMES FRENETIC – COMMERCIAL AND POLITICAL DIPLOMACY UNDER WAY ACROSS THE REGION AND THE LACK OF TANGIBLE, SUSTAINABLE INSTITUTIONAL OUTCOMES.



TABLE 1: GEOPOLITICAL ASSESSMENT OF EASTERN MEDITERRANEAN COUNTRIES AS OF OCTOBER 2023

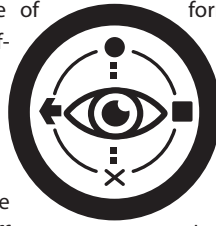
Country	Political system	Political stability	Key geopolitical challenge	Defence posture and priorities	Economic trajectory	Regional power projection
 Cyprus	Parliamentary democracy	Divided between the Republic of Cyprus, which has a stable political system, and the self-declared Turkish Republic of Northern Cyprus, effectively under Turkish occupation since 1974	Building strategic depth	<ul style="list-style-type: none"> <li>Deterrence posture against potential Turkish invasion</li> <li>Priority given to furthering defence cooperation with Israel and Egypt</li> <li>Development of defence relations with the US</li> </ul>	Stable economy after the 2012–13 banking crisis	Limited
 Egypt	Autocracy	The military-dominated government faces significant structural challenges at home that hinder its regional ambitions	Maintaining regional standing	<ul style="list-style-type: none"> <li>Naval modernisation to project power and raise profile in the Eastern Mediterranean and Red Sea</li> <li>Diversification of defence relationships with France, Russia and the US</li> <li>Significant focus on border security given instability and presence of non-state armed groups in Gaza, Libya and Sudan</li> </ul>	Struggling economy due to military capture of state's most profitable assets; dependence on external assistance, primarily from the Gulf states	Growing
 Greece	Parliamentary democracy	Stable government after a decade of political and economic turmoil	Managing Turkish assertiveness	<ul style="list-style-type: none"> <li>Defensive posture focused on Turkish air and maritime threat</li> <li>Ongoing modernisation of the air force and navy</li> <li>Reliance on EU and NATO memberships</li> <li>Hardening posture through mutual-defence agreement with France</li> <li>Focus on regional defence cooperation</li> </ul>	Economic stabilisation and growth after a decade of GDP contraction and budgetary cuts	Limited
 Israel	Parliamentary democracy	Severe crisis owing to domestic political polarisation and failed security model after the attack by Hamas in October 2023	Securing regional integration	<ul style="list-style-type: none"> <li>Offensive posture against non-state armed groups in Lebanon, the Palestinian Territories and Syria</li> <li>Deterrent posture against Iran</li> <li>Focus on airpower and air defence</li> </ul>	Strong economy exposed to domestic turmoil	Significant
 Lebanon	Parliamentary democracy	Foreign-backed domestic non-state armed groups and corrupt governance have generated enduring political vacuums, economic collapse and eroded central authority	Avoiding domestic collapse	<ul style="list-style-type: none"> <li>Weak military focused on domestic and border security</li> <li>Presence of powerful non-state armed groups with independent capabilities and autonomous decision-making</li> </ul>	Collapsing economy due to mismanagement and central-bank Ponzi scheme; reliance on remittances and international aid	None
 Libya	Divided political and military authority	The contest for power and authority has fractured the country, eroded the legitimacy of the vying forces and allowed foreign interference	Restoring territorial and political unity	<ul style="list-style-type: none"> <li>Divided military and security forces focused on territorial control and capture of economic assets</li> <li>Presence of Turkish troops to bolster Tripoli-based government against the eastern, Tobruk-based government</li> <li>Presence of Russian forces in the east</li> </ul>	Economy and extraction of important natural resources hamstrung by divided institutions and governance problems	None
 Palestinian Territories	Weak authority with no sovereignty	Israeli occupation, recurring war and lack of resources or international recognition compound corrupt governance and deep divisions between Palestinians	Achieving statehood	<ul style="list-style-type: none"> <li>Security forces designed for domestic control, unable to counter domestic non-state armed groups or fight Israel Defense Forces</li> <li>Presence of powerful non-state armed groups with access to rockets and foreign support</li> </ul>	Bare-bones economy; heavy dependence on external assistance	None
 Syria	Autocracy	A decade-long internationalised civil war has fractured the country, depleted the legitimacy and reach of the central government and turned it into a regional battleground	Restoring political and territorial control	<ul style="list-style-type: none"> <li>Weak, under-resourced military with minimal offensive means</li> <li>Presence of affiliated non-state armed groups with semi-autonomous agendas and patronage</li> <li>Presence of Iranian and Russian military units</li> <li>Occupation of the Golan Heights by Israel, and unauthorised Turkish and US military presence in the northwest and northeast</li> </ul>	Collapsing economy due to the civil war; high dependence on humanitarian assistance	None
 Türkiye	Illiberal presidential democracy	Stable government facing intense domestic polarisation amid weakening of the rule of law	Maintaining regional centrality	<ul style="list-style-type: none"> <li>Active involvement in the conflicts in Syria and Libya through limited troop deployments and local proxies</li> <li>Military deployment in Northern Cyprus as projection of power, protection for Turkish Cypriot community and deterrence</li> <li>Assertive naval power projection in the Mediterranean</li> <li>Development of local defence industry, especially in the air domain</li> </ul>	Weakening economy due to financial and economic mismanagement	Significant

Source: IISS analysis

## SECURITY OUTLOOK

**The potential for major inter-state conflict has increased since the Hamas attack in Israel on 7 October 2023, after having been low in recent years, while lower-intensity internal conflicts elsewhere are likely to continue and to erupt intermittently.** The Eastern Mediterranean is fraught with conflict, whether frozen or active, direct or proxy, internal or regional. At present, they all appear to be intractable.

The most probable source of conflict involves an out-of-region power – Iran – whose reach into Lebanon, Syria and Gaza now poses an immediate and potent threat to Israel. An uptick in the conflict in the Palestinian Territories could affect other regional dynamics and draw in state as well as non-state actors. A cascade effect into Lebanon and Syria, where other drivers of violence are at play, is an enduring possibility.



Meanwhile, a Turkish invasion of Cyprus is unlikely, but an outright annexation of the unrecognised Turkish Republic of Northern Cyprus is slightly less unlikely. A resurgence of tension and brinkmanship between Türkiye on the one hand, and Cyprus and Greece on the other, possibly joined by France, remains a possibility that hangs over the current fragile thaw.

Importantly, energy discoveries and ambitions have not fostered the transformative regional cooperation that local and external players had hoped for. The 2022 maritime-border agreement between Israel and Lebanon is noteworthy, but it has not had any carryover effect on the conflict between the two. Conversely, no major conflict has erupted because of energy interests. Geopolitical competition and historic grievances continue to trump energy as drivers of conflict.

Israeli army infantry fighting vehicles deploy along the border with the Gaza Strip in southern Israel on 13 October 2023. (Photo: Jack Guez/AFP via Getty Images)





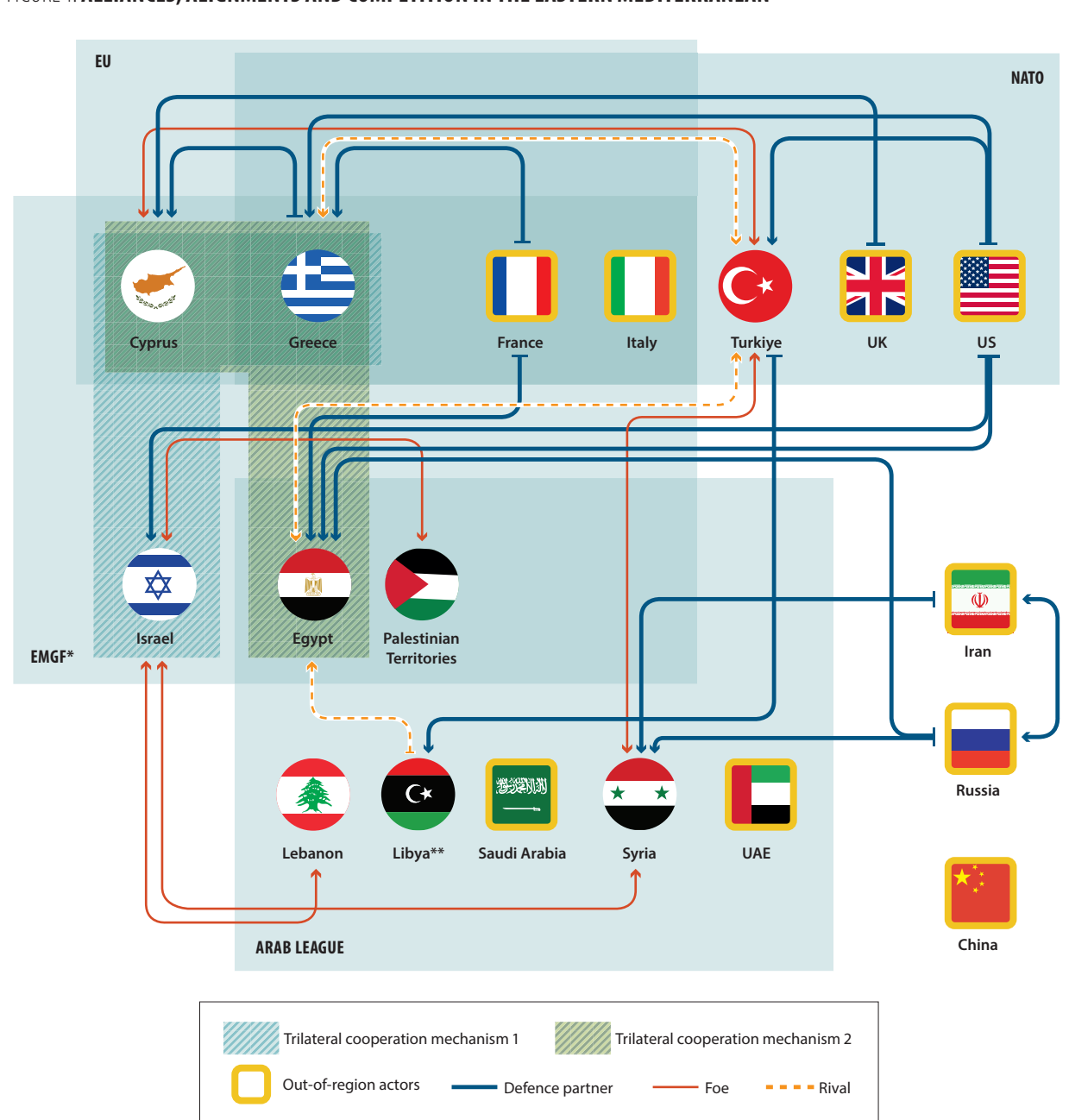
# GEOPOLITICAL LANDSCAPE

**Geopolitics in the Eastern Mediterranean is dominated by Turkiye's assertive posture, big infrastructure and energy projects, and relationships with Western partners and allies.** Turkiye's muscular power projection and ambitions are seen as an existential threat by Cyprus and as an overriding one by

Greece, and have defined a decade of frenetic geopolitical competition in the region. Turkiye's rivals and foes in the Eastern Mediterranean have been engaged in almost constant attempts at pushback over the past decade, but have largely been unable effectively to contain, counter or isolate it, in part

because they do not share the same strategic goals and risk assessments or perceptions. While the Turkish challenge dominates Greek and Cypriot (as well as Syrian) statecraft, Egypt and Israel see it as a sizeable challenge that can be managed, rather than an existential one. Turkiye, for its part, has not been able to

FIGURE 1: ALLIANCES, ALIGNMENTS AND COMPETITION IN THE EASTERN MEDITERRANEAN



\*East Mediterranean Gas Forum

\*\*Interim government

Source: IISS analysis

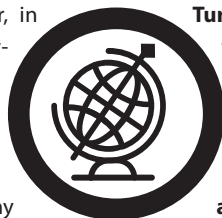


Foreign ministers attend an Arab League extraordinary meeting in Cairo on 11 October 2023. The ministers met to discuss Israeli aggression on the Gaza Strip following the 7 October 2023 assault by Hamas on Israel. (Photo: Khaled Desouki/AFP via Getty Images)

achieve fully its strategic goals: its partners in Syria and Egypt have failed to secure power and its relations with the region's main players (Greece, Egypt and Israel) are filled with mistrust. It has successfully intervened, however, in Libya and Syria, checking powerful foes and making itself central to any diplomatic resolution of these crises.

Western partners and allies – in particular the US, Germany and to a lesser extent France and the United Kingdom – remain indispensable for vital economic, financial, military and diplomatic support. The five countries vying to capitalise on recent gas discoveries – Cyprus, Egypt, Greece, Israel and Türkiye – are jockeying for a prime spot in the massive infrastructure projects and corridors tied to Europe. In contrast,

the geopolitical appeal of Moscow is hampered by its economic and military weakness, while the regional footprint of China's BRI remains limited.



**Türkiye has toned down its forceful policies in the region due to economic necessity, but the country's strategic orientation is now at odds with many of its ostensible allies.** Thanks to its geographic

location, size, military power and aggressive policies, Türkiye has been the only country of the region that has managed to shape its immediate environment, namely through power projection into Syria and Libya. Nevertheless, its economic crisis and fraught relations with its most important NATO allies, as well as other Eastern Mediterranean countries,

prevent it from playing a leadership role in the region.

Strengthened by his re-election, President Recep Tayyip Erdoğan has his eyes set on building a legacy on par with that of the Turkish republic's founder, Mustafa Atatürk. This carries the potential for renewed escalation at sea with Greece and Cyprus, as well as for reigniting tensions with regional powers such as Israel, Egypt and the Gulf Cooperation Council states. Nevertheless, regional resistance and economic necessity have moderated his pursuit of the maximalist *Mavi Vatan* ('Blue Homeland') maritime posture and precipitated a thaw in regional relations. Türkiye's pursuit of its interests in the Eastern Mediterranean also depends on its many other interests and relationships, not least its volatile relations with the US and its complex competition with Russia.



## EXTERNAL POWERS

**The US remains at the centre of regional dynamics and expectations.** Despite its efforts to decrease its physical footprint and political exposure, the US looms large over the region. Except for Syria, all countries in the region expend considerable energy keeping the US engaged. By contrast, European countries are largely seen as providers of assistance and capital rather than strategic shapers.

That said, US policy in the Eastern Mediterranean has become minimalist, opportunistic and reactive. A sober realisation that no resolution to the region's protracted conflicts is likely and that local actors seek to diversify their strategic relations drives US statecraft. Whenever possible, the US has sought to outsource or co-lead crisis management with European countries, as it did with Germany over Turkish–Greek tensions. In recent years, the US has only invested in legacy initiatives, such as regional normalisation between Israel and Arab countries, or limited goals, such as brokering the maritime-delineation deal

between Israel and Lebanon in 2022. This approach eroded the US military posture in the Eastern Mediterranean, until the Russian invasion of Ukraine and the October 2023 war between Hamas and Israel compelled it to increase its deployments and act as a deterrent power. A substantive rise in Russian or Chinese influence, a serious threat to the cohesion of the NATO alliance or a grave threat to Israel (such as a war with Iran or the current conflict with Hamas) could prompt a US resurgence.

**The European Union, the Eastern Mediterranean's closest economic and political giant, is divided, contested and structurally weak in the region, making NATO the more relevant Western organisation.** Most European countries still lack a cohesive engagement plan with this part of their southern flank. France, Germany and Italy remain in the driver's seat but are unable to work together on major issues, including Libya, Türkiye and migration. The EU remains the

Russian President Vladimir Putin (L) talks to Egyptian President Abdel Fattah al-Sisi during a group photo at the second Russia–Africa Summit's Economic and Humanitarian Forum in St Petersburg, Russia on 28 July 2023. (Photo: Getty Images)



central trade and economic partner to the region but its diplomatic sway is undermined by the legacy of Cyprus's accession to the EU in 2004, the protracted Turkish EU membership process and Türkiye's perception of an anti-Turkish bias in the EU. NATO is viewed more favourably and, despite periods of high tension between allies France, Greece and Türkiye, especially in 2020, provides deconfliction avenues and maintains baseline connections through regular military drills.

**Great-power competition is not (yet) a defining feature of the Eastern Mediterranean landscape.** Russia and China have each increased their investments in the region, whether through military sales, nuclear-energy projects or, in the case of China, potential connectivity projects. Russia's military footprint in the region (with a major naval and air presence in Syria and a ground presence in Syria and Libya) has acquired greater relevance since its invasion of Ukraine. Overall, however, they remain second-tier actors. Eastern Mediterranean countries

see them as a lever to shape Western, and in particular American, involvement, but not as game changers.

**The Gulf states' involvement has become increasingly geo-economic and opportunistic in character, rather than geopolitical and ideological.** The Gulf states are wielding their financial clout more strategically and more effectively than in the past, but they are not shapers of the region. They have struggled to impose their preferences on countries over which they ostensibly have influence, for instance Egypt, and to shape durably the politics of countries undergoing conflicts, such as Libya and Syria. Instead, they increasingly prioritise their geo-economic interests, seeing the Eastern Mediterranean as another conduit for their ambitions in Europe. Gulf companies have begun to invest in line with their governments' regional policies. The outcome for the Palestinian Territories after the Hamas–Israel war, however, could compel greater geopolitical involvement.

Turkish President Recep Tayyip Erdoğan (L) and Saudi Crown Prince Muhammad bin Salman Al Saud shake hands as they attend a reception hosted by Qatari Emir Sheikh Tamim bin Hamad Al Thani for the opening ceremony of the 2022 FIFA World Cup in Qatar on 20 November 2022. (Photo: Murat Kula/Anadolu Agency via Getty Images)





MAP 2: EASTERN MEDITERRANEAN GAS LANDSCAPE

**Operational**

- Gas fields
- 🏠 Onshore liquefaction facilities
- Cross-border pipelines
- Other pipelines

**Proposed/planned**

- Gas fields
- 🏠 Floating liquefaction facilities (FLNGs)
- Cross-border pipelines
- Other pipelines
- ⋯ Tiebacks to liquefied-natural-gas (LNG) facilities

**Out of operation**

- Cross-border pipelines

**Operational pipelines**

- 1 Arab Gas Pipeline
- 2 East Mediterranean Gas (EMG) Pipeline
- 3 Israel-Jordan Petrochemical Industry Gas Pipeline
- 4 Israel-Jordan Gas Pipeline

**Proposed/planned pipelines**

- 5 Eastern Mediterranean (EastMed) Gas Pipeline
- 6 Israel-Turkiye Gas Pipeline
- 7 Leviathan-Idku tieback
- 8 Aphrodite-Idku tieback
- 9 Vasilikos FLNG tieback
- 10 Ramat Hovav-Nitzana-Egypt Gas Pipeline

--- Exclusive economic zone (EEZ)

Light blue Territorial sea

Blue Delineated maritime border (contentious)

Red Unilateral maritime claim

Note: Territorial seas, delineated maritime borders and unilateral maritime claims are shown for illustrative purposes only  
Sources: IISS analysis; Sovereign Limits blog

## ENERGY AMBITIONS

**Geo-economic competition is in full swing as Eastern Mediterranean countries seek to embed themselves in major connectivity projects.** Major connectivity and energy projects are expected to transform the geo-economics of the Eastern Mediterranean. Every country in the region is currently manoeuvring to position itself as a node in potential corridors linking Asia and Europe through the Middle East. Every country, moreover, is worried about being bypassed. Key to their success will be location, capital investment, political stability and reliable relations with Western countries. At present, the competition remains between energy and infrastructure projects transiting through a southern route (Israel and/or Egypt) and others through a northern one (Turkiye). Importantly, the cooperation required to boost regional states' collective offer is still rudimentary at best.

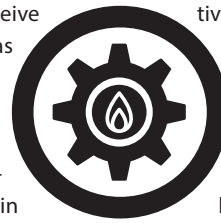
**Eastern Mediterranean energy is more important for Eastern Mediterranean countries than for its intended importers.** The dire socio-economic conditions

of several Eastern Mediterranean countries have made them dependent on, and arguably overly enthusiastic about, discovered or anticipated energy reserves. Energy revenues are seen as essential to secure hard currency and shore up their current accounts. Israel's proven gas reserves have given it domestic self-sufficiency and an additional shield against regional volatility, while Cyprus hopes its discoveries will afford it the same. Importantly, both perceive regional energy cooperation as a way to embed themselves into larger region-wide networks and overcome their respective types of icing-out from other countries in the region.

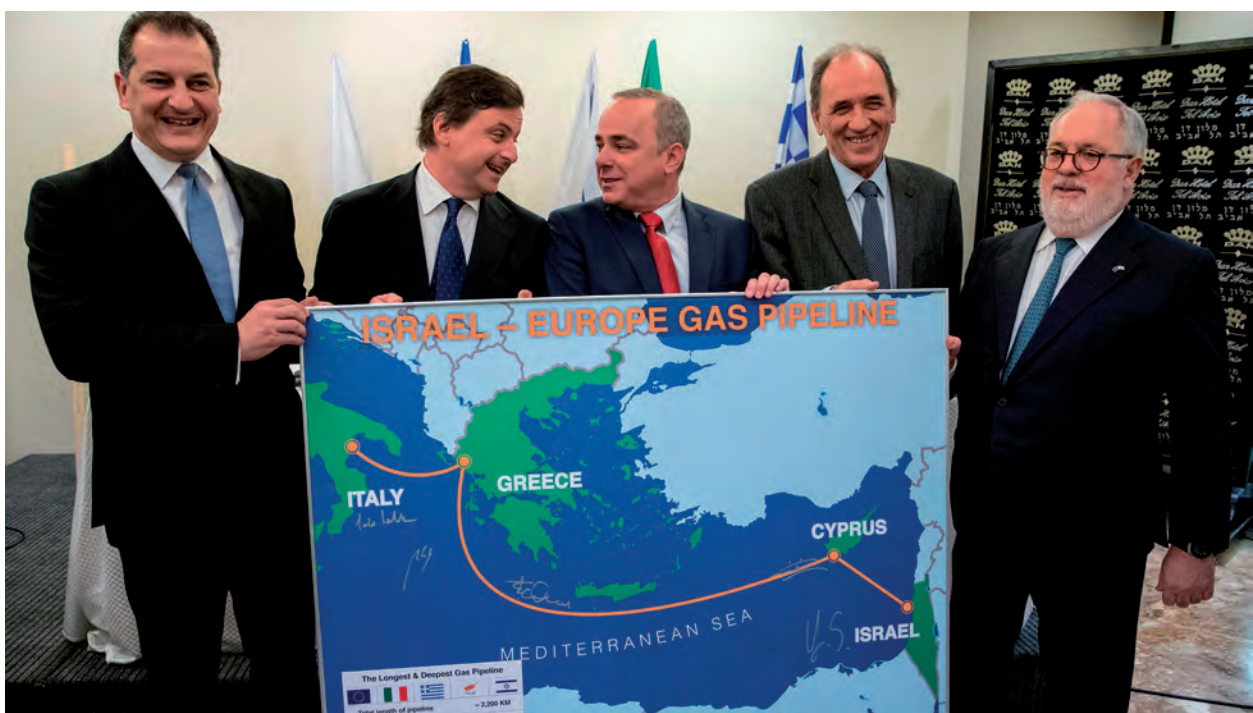
The energy ambitions of Eastern Mediterranean countries face several sizeable challenges. Short-term conditions (notably European concerns about energy security immediately after the Russian invasion of Ukraine) have given Eastern Mediterranean gas a boost that is unlikely to be sustained. The most

optimistic projections of the size of regional gas reserves will make them, at best, a 'good to have' minor diversification source for European markets. Indeed, the combined amount of proven gas reserves in the Eastern Mediterranean represents a fraction of that of major producers such as Qatar and Russia, or even smaller players such as Azerbaijan, but the production costs, export options and political risks are much greater. This relatively small size cannot sustain the

ambitions of three major countries (Egypt, Israel and Turkiye) to become energy hubs. Additionally, these states' export capacity is hamstrung by pressure to use gas domestically, concerns among energy companies about regional volatility and political conflicts, respectively. Finally, mounting climate-related concerns are supercharging Europe's green transition and reducing the window of opportunity for Eastern Mediterranean gas; only Egypt has a clear plan to export green and renewable energy.



(L-R) Cypriot energy minister Georgios Lakkotrypīs, Italian economy minister Carlo Calenda, Israeli energy minister Yuval Steinitz, Greek economy minister Giorgos Stathakis and EU commissioner for climate action and energy Miguel Arias Cañete present a map of the EastMed Pipeline Project during a joint press conference following an energy summit in Tel Aviv on 3 April 2017. (Photo: Jack Guez/AFP via Getty Images)





## DEFENCE TRENDS

**Defence cooperation has thickened links between countries, but it has not translated into formal alliances.** Defence cooperation among regional players remains inconsistent and shallow. The two minilateral groups, also known as trilateral mechanisms, that have emerged in the last decade – one gathering Cyprus, Greece and Israel and the other Cyprus, Egypt and Greece – are not the foundations for new alliances or formal security architectures. High levels of distrust and misaligned objectives and capabilities hamper ambitions for cooperative security.

**Cyprus, Egypt, Greece, Israel and Turkiye are engaged in significant defence-modernisation efforts but it does not amount to an arms race.** These

five Eastern Mediterranean countries are investing heavily in their defence capabilities, prioritising the air and sea domains. This is shifting some of the dynamics between Greece and Turkiye in particular. The former is likely to modernise its fleet with *Rafales* and F-35s, while Turkiye, denied advanced aircraft by the US in response to its purchase of the Russian S-400 air-defence system, can at present only expect to upgrade its existing F-16s. In response, Turkiye has boosted its investments in local defence industry, focusing on producing armed uninhabited aerial vehicles and aiming to manufacture fighter jets, a goal that remains out of reach for now.



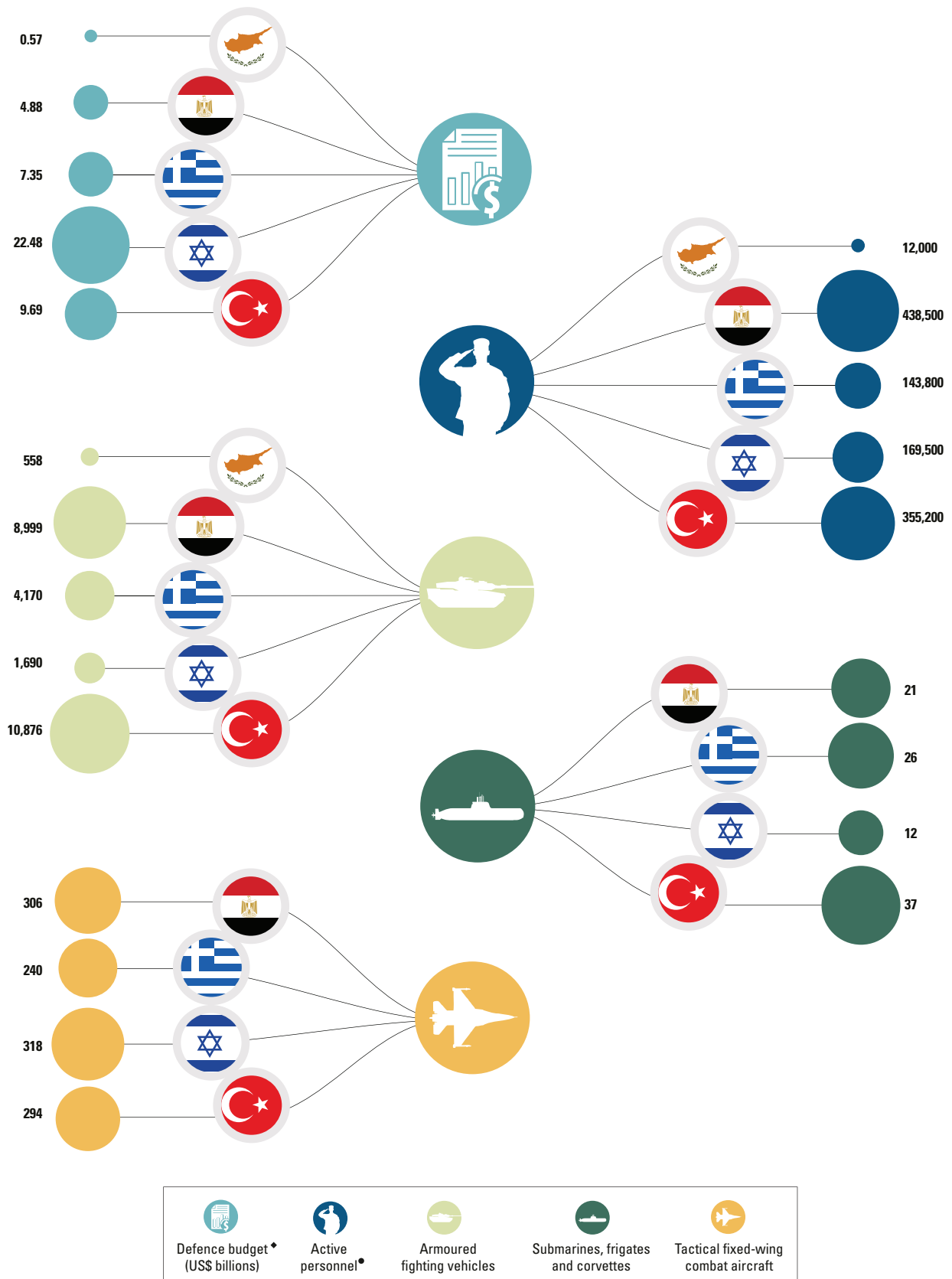
None of these countries has a significant expeditionary capability. Nevertheless, Turkiye has developed an effective model of limited intervention through a mix of direct military involvement and backing of local proxies or influence networks, as seen in Syria and Libya. There, it was able to achieve its limited immediate goals, namely preventing a defeat of its allies in Libya in 2019, and in Syria, controlling Islamist insurgent groups in the north while preventing the establishment of a Kurdish autonomous region in the northeast. In contrast, Israel is focused on domestic defence and regional deterrence, while a wary Egypt has not projected power outside its borders.

TABLE 2: SIGNIFICANT ARMS PROCUREMENT BY SELECTED EASTERN MEDITERRANEAN COUNTRIES SINCE 2010

Country	Land systems	Maritime systems	Air systems
Cyprus	24 x NORA B-52 155mm howitzers MM40 Exocet land-based anti-ship missiles*	1 x <i>Commodore Andreas Ioannides</i> -class (OPV 62) coastal patrol craft	6 x H145M multi-role helicopters
Egypt	7 batteries x IRIS-T SLM medium-range surface-to-air missiles 16 batteries x IRIS-T SLS/X medium-range surface-to-air missiles 200 x K9 <i>Thunder</i> 155mm self-propelled howitzers	4 x Type-209/1400 attack submarines 1 x FREMM frigate 2 x FREMM frigates 4 x <i>El Fateh</i> -class (FRA <i>Gowind</i> ) frigates 4 x <i>Al-Aziz</i> -class (GER MEKO A200) frigates 2 x <i>Gamal Abdel Nasser</i> -class (FRA <i>Mistral</i> ) amphibious assault ships	54 x <i>Rafale</i> fighter ground-attack aircraft Approximately 46 x MiG-29M/M2 <i>Fulcrum</i> fighter ground-attack aircraft 46 x Ka-52A <i>Hokum B</i> attack helicopters
Greece	341 x M113A2/577 tracked armoured personnel carriers	3 x <i>Kimon</i> -class (FDI HN) frigates	24 x <i>Rafale</i> fighter ground-attack aircraft 84 x F-16V (Block 72) <i>Fighting Falcon</i> fighter ground-attack aircraft upgrade Flight training centre and 10 x M-346 training aircraft
Israel	<i>Merkava</i> MkIV <i>Barak</i> main battle tanks* 290+ x <i>Namer</i> tracked armoured personnel carriers <i>Eitan</i> infantry fighting vehicles and wheeled armoured personnel carriers*	3 x <i>Dakar</i> -class attack submarines 1 x <i>Tanin</i> -class attack submarine 4 x <i>Magen</i> -class ( <i>Sa'ar</i> 6) corvettes	50 x F-35I <i>Adir</i> fighter ground-attack aircraft 4 x KC-46A <i>Pegasus</i> tanker aircraft 30 x M-346 ( <i>Lavi</i> ) training aircraft 12 x CH-53K <i>King Stallion</i> heavy transport helicopters
Turkiye	250 x <i>Altay</i> main battle tanks 8 batteries x S-400 (RS-SA-21 <i>Growler</i> ) long-range surface-to-air missiles <i>Hisar A+/O+</i> short-range surface-to-air missiles*	6 x <i>Piri Reis</i> -class (Type-214) submarines 4 x <i>Istif</i> -class frigates 1 x <i>Anadolu</i> -class (ESP <i>Juan Carlos I</i> mod) amphibious assault ship	36 x T129A/B attack helicopters 109 x S-70i <i>Black Hawk</i> (T70) medium transport helicopters Several hundred x <i>Aksungur</i> , <i>Anka-S</i> , <i>Bayraktar Akinci</i> and <i>Bayraktar TB2</i> armed uninhabited aerial vehicles

\*Quantity unknown  
Source: IISS analysis

FIGURE 2: KEY DEFENCE STATISTICS FOR SELECTED EASTERN MEDITERRANEAN COUNTRIES AS OF OCTOBER 2023



♦ Includes Foreign Military Financing

♦ Not including gendarmerie and paramilitary forces

Source: IISS Military Balance+



## COUNTRY INSIGHTS

**Cyprus is seeking to develop its strategic depth to balance its domestic weakness and avert geopolitical disinterest.** Cyprus is embedding itself in Eastern Mediterranean networks linking regional rivals of Türkiye. The transformation of its strategic posture over the past five years from that of an introverted to an extroverted actor amounts to an attempt to gain strategic depth to compensate for its lack of formal alliances. In addition to Greece, its traditional patron, Nicosia is betting heavily on expanding its relationship with the US, has downgraded its relationship with Russia and has invested in relationships with Gulf states, in addition to strengthening relations with Egypt and Israel.

**Egypt's yearning for foreign-policy influence is curtailed by its structural weaknesses.** Egypt has diversified its partnerships due to strategic hedging, regional realignments and its cooling relationship with the US. It aims to assert its regional leadership, contain Türkiye and secure its land borders. Egypt's diplomatic margin of manoeuvre is constrained by its dependency on foreign support, limited power projection and domestic economic distress. Western and Gulf partners are more concerned about the consequences of Egyptian frailty than optimistic about its geopolitical prospects. Nevertheless, despite these obstacles, Cairo has increased its political, military and economic presence and deepened political and defence ties with Greece and Cyprus. Its relationship with Israel, which quietly improved over the past decade, is now being tested by the Hamas–Israel war, but such regional tensions also allow Egypt to demonstrate diplomatic and security relevance.

**Israel has pursued regional security and energy integration as part of a broader strategy of regional normalisation, but its ultimate priority remains national defence.** National security continues to dominate all aspects of Israeli statecraft. Maintaining and, since October 2023, restoring the country's sense of security and military superiority outweigh other considerations. The security and psychological shock of the October attack is likely to

guide strategy for years to come. The prospect of persistent fighting has risen considerably and is likely to transform Israeli society and its view of its immediate neighbourhood.

Until October 2023, a widely shared assessment that Israel had successfully contained and deterred its enemies in the Palestinian Territories, Lebanon and Syria allowed it to pursue regional integration. It built strong relations with Cyprus and Greece, two countries which had previously tilted towards the Arab states. The discovery of gas fields large enough to provide domestic self-sufficiency and exports to neighbours accelerated this diplomatic inflexion, such as through its involvement in trilateral cooperation with Greece and Cyprus or its more recent maritime-delineation agreement with Lebanon. Israel has eschewed building sizeable offshore liquefied-natural-gas facilities (partly out of fear of creating an easy target for its foes in the region), and instead has pursued cooperation with Egypt and Jordan.

**Lebanon's political and economic slide is isolating it from potential regional opportunities.** State capture by Hizbullah, economic collapse and weak governance are driving away Lebanon's partners and investors. The 2022 US-brokered maritime-delineation deal between Lebanon and Israel partly aimed to allow Lebanon to regain credibility, but it may well have little positive carryover effect on the conflict between the two. The country's fate remains hostage to regional dynamics it has little control over even as external disinterest grows.

**The conflict in Libya, which appears intractable, has entangled key regional players.** The domestic competition over authority, territory and resources in Libya guarantees lasting external interference in its internal affairs. Türkiye, but also Russia and Egypt, have emerged as the most influential foreign players. Türkiye's military intervention during the 2019–20 round of fighting and the delineation of maritime boundaries between Ankara and Tripoli in 2019 established an enduring linkage between the Libyan crisis and the disputes in the Eastern Mediterranean.

ISRAEL'S HARDENING  
OCCUPATION, DEEP DIVISIONS  
AND DYSFUNCTION AMONG  
PALESTINIAN FACTIONS, AND  
THE 2023 WAR BETWEEN  
HAMAS AND ISRAEL PRECLUDE  
ANY MOVE TOWARDS  
PALESTINIAN STATEHOOD IN  
THE NEAR TERM.

**A fair settlement of the Palestinian question remains unlikely, fuelling risks of regional war.** Israel's hardening occupation, deep divisions and dysfunction among Palestinian factions, and the 2023 war between Hamas and Israel preclude any move towards Palestinian statehood in the near term. Barring a significant renewed US diplomatic effort, the only – if frail – prospect for improvement is linked to whether potential Saudi–Israeli normalisation yields substantive benefits for the Palestinian Authority. Conversely, the conflict remains ripe for manipulation by Iran, which has invested considerably in shoring up Hamas and stands to benefit from conflict that remains under the threshold of a regional war.

**Syria continues to be an arena for external competition rather than a regional player.** The Damascus government has evolved into a narco-state dependent on Russian and Iranian military forces and struggling to regain territorial sovereignty. With five major military powers operating on its soil and in its airspace (Russia, Iran, the US, Türkiye and Israel), Syria has remained a battleground despite the defeat of the

rebellion at the hands of the Assad regime. Notwithstanding Arab normalisation and an enviable geographic location, Syria remains excluded from major connectivity projects and prospective corridors linking the Gulf states to Europe. Insecurity, sanctions and high levels of political risk make Syria an unpalatable partner, including for sympathetic governments.

**Türkiye and Greece use lawfare as part of their diplomatic arsenal, while existing international-law frameworks have become inadequate to resolve maritime disputes.** International law pertaining to maritime borders, as crafted and executed through multi-lateral organisations, and the United Nations Convention on the Law of the Sea (UNCLOS) in particular, has proven insufficient to resolve maritime border disputes in the Eastern Mediterranean. Geopolitical interests and countries' use of lawfare to legitimise their claims have resulted in a series of piecemeal bilateral deals that have frozen the Greek–Turkish maritime border dispute and created potential, albeit limited, for kinetic confrontation.

TABLE 3: STATUS OF MARITIME BORDERS IN THE EASTERN MEDITERRANEAN AS OF OCTOBER 2023

	Greece	Türkiye	Cyprus	Syria	Lebanon	Israel	Palestinian Territories	Egypt	Libya
Greece			1994					2020	
Türkiye									2019
Cyprus	1994				2007	2010		2003	
Syria									
Lebanon			2007			2022			
Israel			2010		2022				
Palestinian Territories									
Egypt	2020		2003						
Libya		2019							

**Status**

- Undelineated
- Undelineated, contentious
- Delineated
- Delineated, contentious
- None

Source: IISS analysis



## DRIVERS OF INSTABILITY

**Migration and terrorism are the main consequences of Eastern Mediterranean instability against which European countries shape their approaches.** After the peak of 2015–16, migration from the Eastern Mediterranean into Europe is no longer a first-tier inter-border challenge, and the movement of migrants and refugees has diminished considerably. Within the region, however, the number of refugees remains very high and there are prospects for an increase of attempted departures to Europe, including by Syrian refugees fearful of forced repatriation to Syria, by Lebanese driven by the economic collapse and by

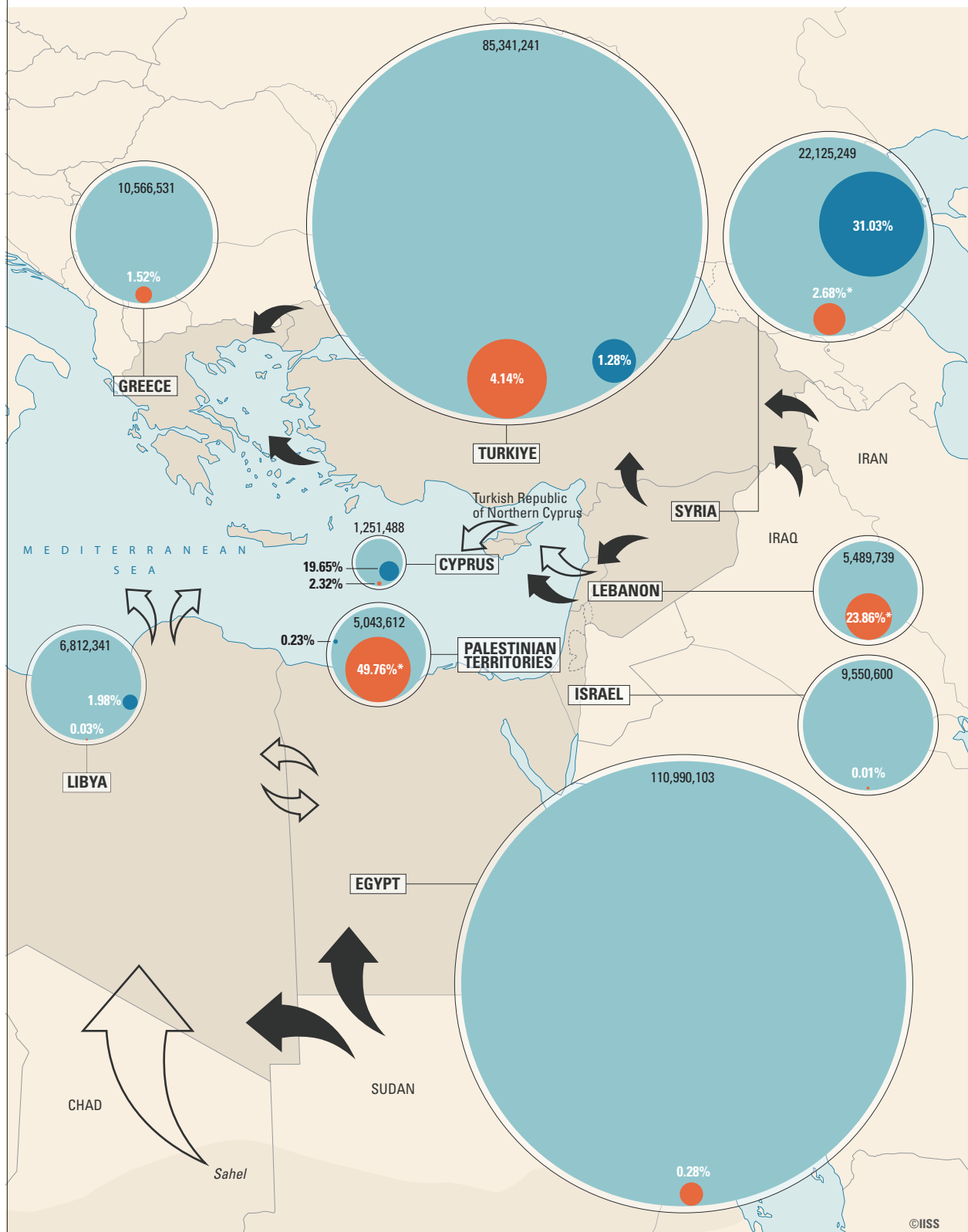
Libyans and Palestinians fleeing conflict. Regional states are increasingly incapable or unwilling to stop migration, while some see it as a way to pressure Western states into providing assistance or aligning politically.

The terror threat within and from the region has been markedly lower than it was at its peak between 2011 and 2017. However, the simmering conflicts in Iraq, Libya and Syria, as well as the resumption of war in the Palestinian Territories, portend renewed violence. Instability in the Sahel, which has repercussions in Libya and Egypt, is also cause for concern.

Syrian refugees sit around a fire in the 'jungle' area of the transit centre in Samos on 29 November 2019. The 'Mount Syria' refugee camp was located on a hillside above Samos town on Samos, Greece. (Photo: Giles Clarke via Getty Images)



MAP 3: MIGRATION FLOWS IN THE EASTERN MEDITERRANEAN AS OF OCTOBER 2023



● Total population in millions (2022)

● Percentage of refugees in local population (2022)

● Percentage of conflict-related internally displaced people (IDPs) in local population (2022)

**Type of migration** ➡ Refugees fleeing political persecution or conflict

➡ Migrants seeking economic opportunities

\*Includes Palestinian refugees registered by UNRWA

Sources: Internal Displacement Monitoring Centre; World Bank; UNHCR; UNRWA

© IISS



## POLITICAL RISK

**Political risk in the Eastern Mediterranean – already significant – has increased since October 2023.** The region's key attribute is its geographic position, which makes it central to and pivotal for energy hubs and connectivity projects linking Asia, the Gulf and Europe. Egypt, Israel, Türkiye, Cyprus and Greece are all competing to benefit from new intercontinental connectivity projects.

The global demand for gas as a climate transition fuel, coupled with the European move away from Russian fossil fuels, has opened up a limited window of opportunity for the region's gas

finds. But political instability, combined with limited resources and infrastructure connections, and generally poor governance, have made investors suspicious and reluctant, save for energy companies, which have often acted at the urging of their governments. Israel and Egypt are the best positioned to profit from the European boon but, as the October 2023 conflict has shown, are exposed to instability. Several countries face US or European sanctions, regulatory frameworks are usually weak and the cost of business is elevated owing to conflict.

A view of the platform of the Leviathan natural-gas field in the Mediterranean Sea is pictured from the beach of Nahsholim, northern Israel, on 29 August 2022. (Photo: Jack Guez/AFP via Getty Images)



# TURBULENCE IN THE EASTERN MEDITERRANEAN

## GEOPOLITICAL, SECURITY AND ENERGY DYNAMICS

This IISS Strategic Dossier Preview highlights selected key findings of a new IISS study due for publication in 2024.

The IISS Strategic Dossier *Turbulence in the Eastern Mediterranean: Geopolitical, Security and Energy Dynamics* surveys the geopolitical landscape, defence dynamics and energy prospects of the region that spans Cyprus, Egypt, Greece, Israel and the Palestinian Territories, Lebanon, Libya, Syria and Türkiye. It assesses the security outlook for the region, considering potential flashpoints for inter-state conflict and evaluating whether newly developed defence ties could evolve into formal alliances. Energy discoveries made in the region in recent years have spurred states' ambitions to become energy hubs. The dossier evaluates whether such aspirations could lay the foundations for deeper regional cooperation or, conversely, increase the risk of confrontation.

The dossier includes both thematic and country-specific chapters. In addition to the countries in the area of study, it explores the involvement of nine external powers – China, the European Union, France, the Gulf Cooperation Council states, Italy, NATO, Russia, the United Kingdom and the United States – and assesses where the opportunities and risks for these actors lie.

This volume will be essential for policymakers and business leaders seeking a better understanding of the factors shaping the geopolitics of the Eastern Mediterranean region.

### The International Institute for Strategic Studies (IISS)

The IISS, founded in 1958, is an independent centre for research, information and debate on the problems of conflict, however caused, that have, or potentially have, an important military content.



### The International Institute for Strategic Studies

Arundel House | 6 Temple Place | London | WC2R 2PG | UK

t. +44 (0) 20 7379 7676 e. [iiss@iiss.org](mailto:iiss@iiss.org) w. [www.iiss.org](http://www.iiss.org)

#### The International Institute for Strategic Studies – Americas

2121 K Street, NW | Suite 600 | Washington DC 20037 | USA

t. +1 202 659 1490 e. [iiss-americas@iiss.org](mailto:iiss-americas@iiss.org)

#### The International Institute for Strategic Studies – Asia

9 Raffles Place | #49-01 Republic Plaza | Singapore 048619

t. +65 6499 0055 e. [iiss-asia@iiss.org](mailto:iiss-asia@iiss.org)

#### The International Institute for Strategic Studies – Europe

Pariser Platz 6A | 10117 Berlin | Germany

t. +49 30 311 99 300 e. [iiss-europe@iiss.org](mailto:iiss-europe@iiss.org)

#### The International Institute for Strategic Studies – Middle East

14th floor, GFH Tower | Bahrain Financial Harbour | Manama | Kingdom of Bahrain

t. +973 1718 1155 e. [iiss-middleeast@iiss.org](mailto:iiss-middleeast@iiss.org)

REGIONAL SECURITY SUMMIT

**IISS Manama  
Dialogue**