



Comparative Maritime Strategies in the Middle East

Series Editor
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Editor's Introduction

Strategic competition in the Middle East tends to be narrowly defined by military capacities: because of the recurrence of conflicts in the region, we too often look at tanks, missiles, and fighter jets as the most reliable indicators of power. Where observers go beyond these to scrutinise developments at sea, their focus is only on the naval element, notably, whether the US navy is in retreat from the Middle East, now that it is no longer dependent on energy supplies from the region, and whether the Chinese navy has developed a blue water capability that allows extended deployments into the region.

However, this security-centred perspective misses an important, and too often forgotten, dimension of the Middle East: the Persian Gulf region remains a major source of the world's seaborne energy supplies, accounting for 34% of global oil exports in 2020 and 26% of liquefied natural gas exports.¹ Meanwhile, the development in recent decades of offshore gas exploration projects in the Mediterranean region has generated new economic interest, both from regional and international players: it is already changing the profile of a country like Israel, which has now become energy independent and is a modest gas exporter. The region could in the future help Europe in its quest to diversify its gas supplies as it seeks to decrease its reliance on Russian supplies.

¹ BP, "Statistical Review of World Energy — 2021", <https://www.bp.com/content/dam/bp/business-sites/en/global/corporate/pdfs/energy-economics/statistical-review/bp-stats-review-2021-middle-east-insights.pdf>

Adding to the importance of energy resources is the geographical location of the Middle East, which makes it a major transit zone for maritime trade. Commonly understood as an area that ranges from Egypt to Oman, the Middle East is a gateway between Europe, Asia, and Africa. From the Gulf of Oman and the Arabian Sea, it is also a gateway to the high waters of the Indian Ocean, exposing countries along the littorals to the great power competition that is taking place there.

“The Middle East has in recent years witnessed a surge of projects ... to exploit newfound offshore gas reserves [in the Mediterranean] and the shipping and logistics opportunities in the region that open up as global maritime trade grows.”

Given these characteristics, the Middle East has in recent years witnessed a surge of projects, launched either by the littoral countries or external powers, to exploit the newfound offshore gas reserves and the shipping and logistics opportunities that open up as global maritime trade grows. These involve massive investments in offshore gas exploration, expansion of port capacities, and shipbuilding. In the past decade, countries like Israel and the United Arab Emirates, for instance, have funded such initiatives as they seek to become maritime powers.

But those ambitions are challenged by local issues that chronically affect maritime security: piracy and terrorist attacks in the waters between the Suez Canal and the Strait of Hormuz have long been a problem for merchant ships and frequently prompt insurance

companies to raise their premiums for vessels plying those waters. The wave of attacks targeting tankers in the Gulf of Oman in May 2019 was a stark reminder of the security risks facing maritime traffic in the region.²

Notwithstanding these traditional security challenges, the region has become an arena of fierce competition among local powers aiming to position themselves as the uncontested hub for maritime freight. This has caused a frenzied construction of gigantic port infrastructures, notably in the UAE, Qatar, Oman and Saudi Arabia, a development that reflects less the demands of global shipping than local ambitions, which begs the question of overcapacity, redundancy and, consequently, the long-term survival of such projects.³

Against this backdrop, this volume of *Insights* aims to investigate how both Middle Eastern countries (notably, Israel, the UAE and Turkey) and external powers (namely, Europe, China, and India) are planning and conducting their maritime strategies in the region. “Maritime strategies” is understood here as economic policies designed by states in coordination with private operators (port management entities, shipbuilders, and shipping companies). Specifically, this collection of

² BBC, “Four Ships ‘Sabotaged’ in the Gulf of Oman Amid Tensions”, 13 May 2019, <https://www.bbc.com/news/world-middle-east-48245204>

³ Eleonora Ardemagni, “The Age of Ports: Gulf Monarchies and Sea Rivalry”, *Aspenia Online*, 29 March 2018, <https://aspeniaonline.it/the-age-of-ports-gulf-monarchies-and-sea-rivalry/>

essays explores how countries and their major private maritime players envision their maritime strategies for the region.

Overall, the articles highlight the absence of one uncontested maritime power: the United States. If the United States remains the primary naval power in the Middle East — thanks to the US Navy's Fifth Fleet operating from the kingdom of Bahrain — it does not have the same maritime ambitions as India, China, or the European countries. In the past two decades, the United States has drastically decreased its consumption of Middle East energy: in 2021, only about 9% of US crude oil imports came from the region.⁴ Meanwhile, since much of US trade with Asia uses trans-Pacific shipping routes, the United States does not see the Middle East as a gateway to Asia like Europe does.

“Rather than being a theatre of great power competition [like Asia], the Middle East is a fragmented landscape made of small and middle local powers seeking greater roles at sea and external powers (China, India, Europe) trying to secure their share of influence — with varying degrees of success.”

As a result, the nature of competition in the Middle East is quite different from that observed in Asia. Rather than being a theatre of great power competition, the Middle East is a fragmented landscape made up

⁴ US Energy Information Administration, “Oil and Petroleum Products Explained”, <https://www.eia.gov/energyexplained/oil-and-petroleum-products/imports-and-exports.php>

of small and middle local powers (e.g., Israel, UAE, Turkey) seeking greater roles at sea and external powers (China, India, Europe) trying to secure their share of influence — with varying degrees of success.

The volume begins with an article by **Frederic Grare** that explores the determinants of India's greater naval involvement in the Gulf region and asks a critical question: Is India a maritime player in the area? Grare's assessment calls for caution: the maritime profile of India reflects as much the strengths of the country's economy as its weaknesses. In other words, India does have an obvious interest in securing its access to the Gulf but its struggle to mount a full-fledged maritime security role in the region shows important resource limitations. Middle Eastern dynamics also play a role in India's inability to significantly increase its maritime profile in the region, with India often getting caught in the rivalry between Iran and the Arab Gulf states.

The second article, authored by **Jonathan Fulton**, investigates China's maritime presence in the Middle East, from its involvement in the expansion of Israel's Haifa port to its growing investments in the UAE's Khalifa port free trade zone and Khalifa industrial zone in Abu Dhabi. Fulton notes that the European Union's importance as a trade partner for China has made maritime connectivity across the Persian Gulf and Mediterranean Sea a crucial component of the country's Belt and Road Initiative. In that context, Beijing's maritime activism in the Middle East is the result of a coherent policy framework that aims to develop a presence in ports and industrial park complexes across the region. Fulton contends that Beijing's current interest in these port cities

is largely commercial rather than military although it has aroused suspicions in the United States, which has dense security relations with most of the Middle Eastern countries concerned.

In the third contribution, **Daniel Fiott** questions the relevance of European maritime strategies towards the Middle East. As major trading nations, the Europeans are highly dependent on maritime routes and the hubs and ports along the Suez Canal, Red Sea, Gulf of Aden and the Mediterranean. The Middle East is in itself important as a source of European imports and destination for European goods. But, as Fiott notes, despite the obvious need for a robust European posture at sea to protect their commercial interests, lack of unity and conflicting priorities, from the war in Ukraine to Europe's growing pivot towards the Indo-Pacific, leave Europe dithering and unable to allocate the much-needed resources to the Middle East. As a result, the European Union's maritime strategy shows a worrisome disconnect between intent and capabilities.

The fourth article, written by **Brendon Cannon**, looks at the emerging maritime ambitions of the UAE and ponders whether the small Gulf state is becoming a "thalassocracy", i.e., a political entity that uses its naval and/or merchant fleet to assert its power and unite possessions separated by water. Drawing a comparison with a historical example, that of Oman in the 18th and 19th centuries, Cannon notes that the efforts of Dubai's port operator, DP World, to refurbish and expand a string of ports in the Red Sea and Horn of Africa have not yielded political influence for the UAE's political leadership. He provides a cautious conclusion: Abu Dhabi may seek a greater role at sea but as of now its capabilities — either civilian or military — are too limited to fulfil those ambitions.

In the final article, **Ehud Eiran** delves into the details of offshore gas discoveries in the East Mediterranean Sea since the late 1990s. Eiran acknowledges that these discoveries have changed the economic prospects of countries like Israel, Egypt, Cyprus, Greece, and Turkey. But after years of exploration, the initial optimism has been replaced by caution: extracting natural gas in the Mediterranean has demanded costly investments that took time to deliver. Furthermore, the economic output from the discoveries may have ushered in cooperation among littoral states but they have also fuelled tensions, be it between Turkey and Cyprus, or most recently between Israel and Lebanon.

Together, the articles in this volume provide a snapshot of the ever-evolving maritime landscape in the Middle East. Given the volatility and the depth of the topic, the collection is not meant as a definitive account of maritime competition in the region. Instead, it was conceived as an initial contribution aimed at fostering academic and policy discussions on a much too often neglected topic. ♦

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Is India a Maritime Player in the Gulf?

Frederic Grare*

This article explores the economic and political determinants of India's greater naval involvement in the Gulf region since the turn of the century. It argues that economic and political relations have developed faster than India's capacities to mount a full-fledged maritime security role in the region. Since India's growing security involvement in the Gulf region is a strategic consequence of its growing economic relations with the region, it is bound to lag behind the country's economic presence. India remains dependent on the US naval presence in the Gulf in an environment increasingly characterised by tense relations with China.

Asking whether India is a maritime player in the broader Middle East can seem surprising, if not counterintuitive. Located astride critical sea lanes, between the straits of Bab del-Mandeb on one side and Malacca on the other, India should be seen as a natural actor in the Gulf maritime security landscape. Yet, India's maritime role in the region is relatively new, confined for many years following independence

to the waters adjacent to its littoral, with no real capacity to go beyond the Bay of Bengal on the east and the Arabian Sea on the west.¹

However, this situation has evolved considerably since the beginning of the 2000s, when New Delhi started redefining its interests in the western Indian Ocean Region. The Indian navy embarked on capacity building and security cooperation with the Arab Gulf states as part of the “Look West Policy” initiated in 2005 by Prime Minister Manmohan Singh and continued by his successor, Narendra Modi, who put more emphasis on the security dimension of the policy. In pursuing this policy, both prime ministers intended to address the need to guarantee India’s energy security as well as the growing political unpredictability and deteriorating security that characterised the Gulf, in particular after the terrorist attacks of 11 September 2001, a situation complicated by China’s increasingly invasive presence.

“New Delhi has started redefining its interests in the western Indian Ocean Region since the beginning of the 2000s.”

The development of the Indian navy’s role in the Gulf had been inhibited by several factors. Pakistan’s close relations with several Gulf countries were a major one. Against Islamabad’s opposition, India managed to develop strong security partnerships with several Arab Gulf countries in recent years. Relations with Oman and the United Arab

¹ When Saddam Hussein invaded Kuwait in 1990, India found itself in the position of hapless spectator, with no real capacity to influence events despite the threats to its economic interests and expatriate population in the Gulf.

Emirates (UAE) intensified, for example. Yet, continued closeness between Pakistan and many Gulf countries impinged on India's room for geopolitical manoeuvring in the region. Differences with Arab Gulf countries over Iran, with which India, against US opposition, maintained political ties, also played their role.

But despite real improvements, the main impediment to Delhi's naval ambition in the region remains the Gulf states' weak perception of India as a significant player in the Gulf. Cooperation between India and these states has intensified but remains limited to non-traditional security issues. Prospects for further developments are real, but the process is likely to be incremental as India may have to reassess its military priorities: the Covid-19 pandemic will have constrained India's resources, while the continuing tensions with China on the Himalayan border, particularly since the 2020 clashes in the Galwan valley, may once again affect the navy's budgetary allocation in favour of the army. As a result, India may have to keep relying on US forces for the security of the Gulf region.

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The Determinants of the “Look West” Policy

The Economic Imperative

Developing maritime relationships to the west of the Indian Ocean was a natural step for India. Its sizeable economic growth following the reforms of the 1990s increased the country’s dependence on the Middle East for its energy supplies, which in turn increased its strategic vulnerabilities. India also has considerable economic interests in the Gulf that it needs to protect. It often goes unnoticed that in 2008–2009 India’s non-oil trade with the countries of the Gulf Cooperation Council (GCC) had already amounted to US\$86.9 billion. This far surpassed India’s trade with ASEAN (US\$44.6 billion) during the same period, despite some 15 years of India’s “Look East Policy”. It also surpassed India’s trade with the European Union (US\$80.6 billion) and with the United States (US\$40.6 billion).²

“More than 8 million Indians live in the Gulf region ... The mere presence of these numbers in the Gulf could potentially reduce India’s policy options in times of crisis because of insufficient Indian capacity to ensure their security.”

Like its eastern counterpart, the Look West policy started with negotiations for a Free Trade Agreement (FTA) with the member states

² David Brewster, “India and the Persian Gulf: Locked out or staying out?”, *Comparative Strategy* 35 (2016): 58–71, doi: [10.1080/01495933.2015.1089126](https://doi.org/10.1080/01495933.2015.1089126)

of the GCC, alongside parallel negotiations with some of them for comprehensive bilateral economic agreements covering the services sector and investment.

A Framework Agreement on Economic Cooperation between India and the GCC was signed on 25 August 2004. It provided that both parties initiate discussions on the feasibility of an FTA. However, the discussions that started soon afterwards failed as the GCC deferred its negotiations with all countries and economic groupings.

Nevertheless, trade continued to increase. In 2020–2021, despite the pandemic, India's trade in commodities with the GCC countries amounted to US\$87.347 billion.³ In comparison, similar trade with ASEAN for the same year amounted to US\$78.905 billion⁴ and that with the European Union to US\$81.075 billion.⁵ Moreover, more than 8 million Indians live in the Gulf region, where they constitute an important source of remittances for the country (US\$42 billion in 2018).⁶ The mere presence of these numbers in the Gulf could potentially reduce India's policy options in times of crisis because of insufficient Indian capacity to ensure their security.

³ Ministry of Commerce and Industry (India), Trade Statistics, <https://tradestat.commerce.gov.in/eidb/ergnq.asp>

⁴ Ministry of Commerce and Industry (India), Trade Statistics.

⁵ Ministry of Commerce and Industry (India), Trade Statistics.

⁶ Anisur Rehman, "The Important Role Of Indian Diaspora In Country's Gulf Policy", *Financial Times*, 22 August 2019, <https://www.financialexpress.com/defence/the-important-role-of-indian-diaspora-in-countrys-gulf-policy/1683095/>

The China Factor

Concerns about the growing Chinese presence in the Gulf as well as at the gates to the Red Sea also played a role in India's efforts to increase its naval profile in the region. China's reach towards the Indian Ocean is the strategic consequence of its economic performance since the 1980s. China became a net oil importer in 1993–1994 and in 2015 it became the largest importer of oil in the world. Today, more than half of its oil imports comes from the Middle East. Like India, China needs to ensure the security of its energy supply. China's economic presence in the Gulf also is growing. Consequently, China has sought to increase its naval presence in the region.

“From India's perspective, China's growing naval footprint in the region was already too challenging by the turn of the decade.”

The Chinese navy's early presence in the Indian Ocean, where it positioned itself at the entry to the Red Sea, had the blessings of some Western powers, who were hoping that China's involvement in anti-piracy operations would contribute to its socialisation into Western norms of behaviour. However, their hopes were quickly shattered, with China contributing little to joint anti-piracy operations in the Arabian Sea and the Gulf of Aden although its presence did enable it to conduct large-scale operations to rescue its nationals from Libya in 2011 and Yemen in 2015.

Soon, however, the Chinese navy pursued its own strategic agenda in the region by establishing a military base in Djibouti in 2016 as

relations with the Gulf countries expanded and diversified. The Gulf became very much part of Beijing's Belt and Road Initiative (BRI), with China finding ready partners among the Gulf states, whose respective "national visions" had ambitious goals of building logistics facilities and other infrastructure. Oman, Saudi Arabia and the UAE were early and active participants in the BRI through the development of a chain of port-industrial park complexes aimed at linking markets across the Middle East region. In 2014 President Xi Jinping of China laid out a blueprint for the development of Sino-Arab cooperation, referred to as the 1+2+3 framework. Energy was identified as the first pillar of that cooperation, reinforced by infrastructure development and trade and finance facilitation and supported by cooperation in the technical fields of nuclear and renewable energy and space technology.⁷

Although China's economic presence in the region cannot be rolled back, its maritime presence in the region is not strategically significant yet. Moreover, China has shown little appetite for challenging the US-led security architecture or playing a significant role in regional politics.⁸ But, from India's perspective, China's growing naval footprint in the region was already too challenging by the turn of the decade. Therefore, it felt compelled to engage Gulf navies so that it could establish and develop strategic influence.

⁷ "Investment strengthens ties between China and the GCC", Oxford Business Group, 2021, <https://oxfordbusinessgroup.com/analysis/looking-east-enhanced-cooperation-and-investment-across-range-sectors-strengthening-ties-1>

⁸ Camille Lons (ed.), "China's Great Game in the Middle East", ECFR Policy Brief, October 2019, https://ecfr.eu/wp-content/uploads/china_great_game_middle_east.pdf

Development of Naval Ties under Modi

Although India's Look West policy never became as comprehensive as the Look East policy owing to the lack of GCC political institutions comparable to that of ASEAN's, it had a military dimension as well, linked to India's need to guarantee its energy security and the growing political unpredictability and deteriorating security that characterised the Gulf region, in particular after the terrorist attacks of 11 September 2001.

In 2008, India started partnering with regional maritime forces in anti-piracy operations, providing support and training to the navies of the GCC, three of them being members of the Indian Ocean Naval Symposium (IONS), an international forum that India initiated the same year. The objective behind such training and other forms of support was to contribute to the security of the northern waterways of the Indian Ocean and to protect the considerable trade that India had nurtured with the GCC countries. Starting in 2012, India considerably increased its naval interactions with the Gulf region, with a greater number of Indian ship visits to ports in the UAE, Saudi Arabia, Oman, Bahrain, Kuwait and Qatar.⁹

However, it was only after Modi's ascent to power that the development of maritime ties with the Gulf experienced a qualitative turn. The broad parameters of India's Middle East policy were already in place when Modi became prime minister in May 2014. The Look West policy had been economically successful, but it had not produced results

⁹ Abhijit Singh, "India's Evolving Maritime Posture in the Indian Ocean: Opportunities for the Gulf", *EDA Insight*, Emirates Diplomatic Academy, August 2020, <https://www.agda.ac.ae/docs/default-source/Publications/eda-insight-aug-2020-eng-abhijit.pdf?sfvrsn=6>

to the level of initial expectations in the security domain. The new prime minister did not change the overall direction of the policy and kept developing its economic dimension. But, at the same time, he placed greater emphasis on defence and security cooperation, leading to India substantially enhancing its exchanges in maritime training, operational exercises and information sharing with Arab Gulf navies.

“Oman has played a key role in sustaining India’s security effort in the Gulf of Aden, hosting a crucial Indian listening post and offering berthing and replenishment facilities to Indian ships.”

By then, India had already established significant naval cooperation with Oman, its closest maritime partner in the Gulf with which it signed a strategic partnership in 2008. Naval cooperation between the two countries began in 1993, materialised in the biennial Naseem Al-Bahr exercises. Oman has played a key role in sustaining India’s security effort in the Gulf of Aden, hosting a crucial Indian listening post and offering berthing and replenishment facilities to Indian ships.¹⁰ A logistics agreement signed in March 2018 in Muscat marked a new step in the bilateral cooperation, providing the Indian navy access to the deep sea port of Duqm. A year later the Indian navy deployed its P-8I long-range maritime surveillance aircraft to Salalah to patrol the Gulf of Aden.

¹⁰ Abhijit Singh, “India’s Evolving Maritime Posture in the Indian Ocean”.

The Indian navy had regularly trained Gulf naval personnel, but relations in this respect with Saudi Arabia and the UAE became more significant in recent years. This was especially the case with the UAE as its ambitions in the Indian Ocean began developing and, like India's own ambitions, encountered competition with China on the coasts of eastern Africa. In May 2016, Manohar Parrikar, then India's defence minister, initiated talks with the UAE for the strengthening of military ties and for exploiting opportunities for joint defence manufacturing. A year later India and the UAE signed a comprehensive strategic partnership, expanding the scope of defence cooperation. In March 2018, the Indian and UAE navies conducted their first bilateral exercise.¹¹

Relations with Saudi Arabia evolved in parallel. Starting in 2016, a series of agreements led to the first ever joint naval exercise between the two navies during Modi's visit to Riyadh in October 2019,¹² when the two sides agreed to expand cooperation on "securing the Indian Ocean waterways and the Gulf region from the threats and dangers that may affect the whole region".¹³ Naval interactions with Bahrain and Qatar also increased during the same period but their scope and pace were more limited.

¹¹ Abhijit Singh, "India's Evolving Maritime Posture in the Indian Ocean".

¹² Huma Siddiqui, "Strengthening ties: India-Saudi Arabia to hold the first ever joint naval drill", *Financial Express*, 25 October 2019, <https://www.financialexpress.com/defence/strengthening-ties-india-saudi-arabia-to-hold-the-first-ever-joint-naval-drill/1745816/>

¹³ Abhijit Singh, "India's Evolving Maritime Posture in the Indian Ocean".

Impediments to the Development of India's Maritime Ambitions

Despite the various imperatives behind the launching of the Look West policy, India's strategic influence over the GCC countries has remained limited. One obstacle to India's ability to develop closer security partnerships with these countries is Pakistan, which has developed its own political and military nexus with several Gulf Arab countries. Middle Eastern dynamics is another factor that limits India's ability to increase its maritime interactions with the latter. India's strategic influence over the GCC countries also remains limited partly because the latter have continued to rely on the United States for their security and do not see India being able to take over that security role.

The Pakistan Factor

Pakistan's influence is one obstacle to the Indian navy's ability to raise its naval profile in the Gulf region. Pakistan and the Gulf countries have obvious cultural and religious ties but have also been bound strategically and economically for decades. Military relationships between Islamabad and each of the Gulf countries have been particularly strong. The oil boom in the 1970s marked the beginning of Pakistan's greater role in the Gulf region. The new oil-rich countries invested a substantial amount of their wealth in acquiring state-of-the-art weaponry but did not always possess the necessary personnel and know-how to deploy those weapons. Pakistan's military personnel were therefore deputed to the GCC countries to handle complex equipment and to train local security forces. These links extended to the naval domain, with Pakistan helping

to create and train the Saudi naval forces, for example.¹⁴ Islamabad has since been seen as a dependable ally when it comes to defending Gulf interests.

However, New Delhi does have a slight edge over Pakistan through its ability to cooperate with the region in counter-terrorism efforts and the sheer size of its economy, which makes it an attractive market for Gulf energy and investments.

Middle Eastern Dynamics

India's relations with the Gulf countries are also indirectly affected by Middle Eastern dynamics, with India often getting caught in the rivalry between Iran and its Arab neighbours. The Arab Gulf countries are hesitant to deepen their military engagement with India because of its ties with Iran. At the same time, India's grudging effort to distance itself from Iran on the latter's nuclear issue has provided an opening to China to develop closer ties with Iran.

India-Iran relations are composed of both economic and security elements. Even though India has ceased to supply Iran with refined petroleum products in the wake of the nuclear standoff between Tehran and some Western countries, India still sees Iran as a key energy supplier. Moreover, Indian policy makers see relations with Iran as a way of enhancing India's security in Central and South Asia: Iran serves as a means of containing India's main rival, Pakistan, while also offering a counterweight to China's rising regional presence. As observed by British

¹⁴ Arhama Siddiqua, *The Convergence of Pakistan and Gulf Strategic Interests: An Assessment*, Centre for Middle Eastern Studies, Ankara, 2020, https://www.orsam.org.tr/d_hbanaliz/Kitap_Serisi-1-2.pdf

analyst Guy Burton, “For Iran and India alike, the path to constraining Pakistan lies through Afghanistan, which has become a base for militant groups whose threats transcend the country’s borders.”¹⁵

“New Delhi saw the development of Chabahar [in Iran] not only as beneficial in economic terms but also potentially beneficial in a strategic sense as it could serve to balance China’s trade and development projects in Central Asia and the Middle East through the Belt and Road Initiative.”

In 2003 India and Iran agreed to cooperate on the development of trade and transport links through Central Asia and channel them towards Iran’s Chabahar port on the Indian Ocean. New Delhi saw the development of Chabahar not only as beneficial in economic terms but also potentially beneficial in a strategic sense as it could serve to balance China’s trade and development projects in Central Asia and the Middle East through the BRI. Indeed, Chabahar offers an alternative to China’s efforts to extend its influence in the region that include improving the Pakistani port of Gwadar, located some 100 nautical miles across the sea from the Iranian port.¹⁶

¹⁵ Arhama Siddiq, *The Convergence of Pakistan and Gulf Strategic Interests*

¹⁶ Guy Burton, “India’s look West Policy in the Middle East under Modi”, Middle East Institute (Washington DC), 6 August 2019, <https://www.mei.edu/publications/indias-look-west-policy-middle-east-under-modi>

But the growing naval ties between India and the Arab Gulf countries have had to face similar — if disconnected — developments on the Iranian side. The net impact of increased interactions between India and the UAE, for example, should be gauged against similar increased interactions between China and Iran. Beijing benefitted from New Delhi's efforts to limit its interactions with Iran, which were a consequence of India's growing proximity to the United States. In December 2019, Iran, China and Russia conducted their first trilateral naval exercise, and in March 2021, Iran and China signed a comprehensive strategic partnership.¹⁷

It could be argued that India's posture of relative neutrality between Iran and the Arab Gulf states, as understandable as it may be from New Delhi's perspective of India's geostrategic constraints, affects India negatively on both sides.

“India's posture of relative neutrality between Iran and the Arab Gulf states, as understandable as it may be from New Delhi's perspective of India's geostrategic constraints, affects India negatively on both sides.”

Whether India's engagement with Iran over Chabahar is likely to eliminate the China/Pakistan (Gwadar) option is debatable. Deeper India-Iran relations have certainly limited the Arab Gulf countries'

¹⁷ Ian Dudgeon, “The Iran-China Comprehensive Strategic Partnership: Winners and Losers”, Australian Outlook, 9 April 2021, <https://www.internationalaffairs.org.au/australianoutlook/the-iran-china-comprehensive-strategic-partnership-winners-and-losers/>

enthusiasm for closer ties with India and affected the perception of India as a potential security provider. While this argument should not be exaggerated and the current situation may indeed be optimal from an Indian perspective, it does illustrate the constraints that India faces in developing its maritime interactions.

Perceptions of India and the US Factor

Other factors play a role as well. Limited naval capacities lead the Gulf states to turn to external powers for security guarantees. Because of its anti-piracy operations in the north-west of the Indian Ocean, India has considered itself a net security provider in a region that it perceived as its “sphere of influence”, in the words of former External Affairs Minister Jaswant Singh, or its “strategic footprint”, in the words of former Prime Minister Manmohan Singh.¹⁸ Yet, many Gulf states view the United States, not India, as the indispensable security provider in the region. Most Arab navies tend to limit their naval cooperation with India to non-traditional security issues. Indeed, India too depends partly on the United States military. In that sense, if India is increasingly seen as a maritime player in the greater Middle East, it is not seen as a major one, and is unlikely to be seen as such even if the United States were to reduce its involvement in the region in the future.

Some Gulf states also intend to diversify their options and not be locked into exclusive relationships. Much to India’s discomfort, they do not close their shores to China. It took intense US pressure to convince the UAE authorities to stop a Chinese port project near Abu

¹⁸ David Brewster, “India and the Persian Gulf”.

Dhabi.¹⁹ India has indeed every incentive to prevent China's attempts to acquire a strategic position in the region but less to offer economically than its powerful northern neighbour.

Naval Diplomacy: The Way to Go

The trajectory of India's maritime presence in the Gulf is likely to be a function of these various constraints. As the polarisation between China and the United States grows, the real but nevertheless slow increase of India's naval assets makes India more dependent on the latter, even as US economic interests in the region are declining, making the reliability of its long-term security investment in the region less certain.

“The navy remains primarily one instrument in the larger Indian foreign policy apparatus.”

In this context and despite its ups and downs, naval diplomacy with the Gulf states may be more important for India than tactical synergy in the naval arena. Naval diplomacy is a way for India to assert its presence. It has validated India's strategic capability in the Middle East. But the navy remains primarily one instrument in the larger Indian foreign policy apparatus. As stated by Indian maritime security analyst Abhijit Singh, the navy has been “critical in rebalancing the Indian

¹⁹ Gordon Lubold, Warren P. Strobel, “Secret Chinese port project in Persian Gulf rattles US relations with UAE”, *The Wall Street Journal*, 19 November 2021, <https://www.wsj.com/articles/us-china-uae-military-11637274224>

Ocean emerging narrative to favour India's interests".²⁰ But, in the Gulf, at least, the Indian navy has not yet convinced the littoral states of its capacity to dramatically alter the balance of power. ♦

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This article was first published online on 5 July 2022

²⁰ Abijhit Singh, "India's Middle-Eastern Naval Diplomacy", Middle East Institute (Washington, DC), 27 July 2017, <https://education.mei.edu/content/map/indias-middle-eastern-naval-diplomacy>

From Haifa to Abu Dhabi

China's Maritime Strategy in the Middle East

Jonathan Fulton*

This article explains how the Middle East features in the maritime component of China's Belt and Road Initiative (BRI). Beginning with a discussion of the region's utility for the BRI, it then describes how China applied an existing model — the Shekou model — to develop a presence in ports and industrial park complexes in six regional countries: the United Arab Emirates, Oman, Saudi Arabia, Djibouti, Egypt, and Israel. These commercial projects provide China with port access in strategically important cities from the Persian Gulf to the Mediterranean Sea, supporting its maritime economic and strategic ambitions while at the same time contributing to host countries' development agendas.

The announcement of the Belt and Road Initiative (BRI) in 2013 was a major turning point in China's foreign policy, as well as an indicator of its deepening political and economic engagement with participating countries.¹ Of the first two components of the BRI, the Silk Road Economic Belt (SREB) and the Maritime Silk Road

¹ For studies on the BRI, see Nadège Rolland, *China's Eurasian Century? Political and Strategic Implications of the Belt and Road Initiative* (The National Bureau of Asian Research, 2017); Jonathan Fulton, ed., *Regions in the Belt and Road Initiative* (Routledge, 2020).

Initiative (MSRI), the latter is of far greater significance in the Middle East and North Africa (MENA).² Given the European Union's importance as a trade partner for China, maritime connectivity across the Persian Gulf and Mediterranean Sea is a crucial element of the BRI. Consequently, Beijing has focused on developing a deeper presence in several MENA port cities over the past decade.

“Given the European Union’s importance as a trade partner for China, maritime connectivity across the Persian Gulf and Mediterranean Sea is a crucial element of the Belt and Road Initiative.”

China's regional engagement has been largely focused on economic benefits rather than strategic concerns. This is consistent with what Sun and Zoubir describe as an economic diplomacy “embedded in its business-first strategic culture, i.e., making economic development the priority of the government’s tasks”.³ Chinese officials too emphasise this perspective when discussing the BRI; President Xi Jinping asserted that it is “not a tool to advance any geopolitical agenda, but a platform for economic cooperation”.⁴ This statement deserves a critical response.

² On the MSRI in MENA, see Jean-Marc F. Blanchard, ed., *China's Maritime Silk Road Initiative, Africa, and the Middle East: Feats, Freezes, and Failures* (Palgrave Macmillan, 2021). For MSRI in the Gulf region, see Jonathan Fulton, “Domestic Politics as Fuel for China's Maritime Silk Road Initiative: The Case of the Gulf Monarchies”, *Journal of Contemporary China* 29, No. 122 (2020): 175–190.

³ Degang Sun and Yahia H. Zoubir, “China's Economic Diplomacy towards the Arab Countries: Challenges Ahead?” *Journal of Contemporary China* 24, No. 95 (2015): 908.

⁴ “Xi says Belt and Road Initiative not geopolitical tool”, Xinhua, 3 September 2017.

There are political and normative values underpinning any project, and they will undoubtedly serve geopolitical goals, directly or indirectly. Regardless, for the time being, China's approach to these port cities has been commercial rather than military, although China did open its first overseas base in Djibouti in 2017.

The Middle East in China's Maritime Ambitions

The BRI is primarily a series of projects designed to connect and integrate cooperating partners — cities, markets and countries — across regions, and therefore a partner's degree of connectivity plays a larger role than factors like its regime type or market share. In the case of MENA countries, this means that a favourable geopolitical location and integration into key facets of the global economy are important indicators of utility in Beijing's regional policy. Iran, for example, is a potentially major economy with a strong state, a large market and a coastline that could provide China with overland access to the Gulf. However, its political and economic isolation make it a less useful MSRI partner, and China has so far done little in the realm of ports or industrial parks in Iran. One could make the point that Iran is an outlier given the unique range of factors at play in its case, but in fact it is a striking example of how circumstances can prevent several countries with otherwise favourable endowments from benefiting from the MSRI. Yemen, Syria, Lebanon and Libya would all be obvious candidates for Chinese port investments, but due to political instability, insecurity, or both, they are bypassed.

During the 2018 China-Arab States Cooperation Forum, Chinese Foreign Minister Wang Yi announced a framework for MENA countries to partner in MSRI: the "Industrial Park–Port Interconnection,

Two-Wheels Two-Wings Approach” (henceforth 2W2W).⁵ Here, the “two wheels” are energy cooperation (conventional oil and gas and low-carbon energy) and the “two wings” are cooperation in technology (artificial intelligence, mobile communications, and satellite navigation) and investment and finance. This is fundamentally similar to the Shekou model, or “Port-Park-City” development model, developed by China Merchants Port Holdings and used to great effect in Chinese economic free zones such as Shenzhen, as well as in China’s economic engagement in Southeast Asia.⁶ The Shekou model “entails developing adjacent industrial parks, commercial buildings, highways, free trade zones, residential area, and power plants” with the goal of developing “a larger, integrated system that helps sustain the port and is sustained by it in turn”.⁷ In MENA’s case, the 2W2W emphasized four ports where China would increase its presence, and four industrial park projects at varying stages of development. The ports are:

- Khalifa Port Free Trade Zone (KPFTZ) in Abu Dhabi,
- Oman’s Port of Duqm,
- the support base of the People’s Liberation Army Navy (PLAN) in Djibouti, and
- Port Said in Egypt.

⁵ Permanent Mission of the People’s Republic of China to the United Nations, “Wang Yi: China and Arab states should jointly forge the cooperation layout featuring ‘Industrial Park-Port Interconnection, Two-Wheel and Two-Wing approach’”, 10 July 2018, <https://www.mfa.gov.cn/ce/como//eng/news/t1576567.htm>

⁶ Xue Gong, “China’s Belt and Road Initiative Financing in Southeast Asia”, *Southeast Asian Affairs*, 2020, 77–95.

⁷ Daniel R. Russel and Blake H. Berger, “Weaponizing the Belt and Road Initiative”, Asia Society Policy Institute, 2020, 20.

The industrial parks are:

- Khalifa Industrial Zone Abu Dhabi (KIZAD),
- the China-Oman Industrial Park in Duqm,
- the Chinese Industrial Park in Saudi Arabia's Jizan City for Primary and Downstream Industries (JCPDI), and
- the TEDA-Suez Zone in Ain Sokhna, Egypt.

Since this initiative was announced engagement across the eight projects has been uneven, with some enjoying significant momentum, others seemingly stalled, and other, non-2W2W ports or parks in the region becoming more significant in Beijing's MENA presence.

Abu Dhabi, UAE

China's political and economic presence in Abu Dhabi has increased dramatically since 2015 when its crown prince and the UAE's de facto ruler Mohammed bin Zayed al Nahyan made a state visit to Beijing.⁸ Previously, Dubai was the anchor of the China-UAE relationship with the largest Chinese expatriate community in MENA, estimated between 270,000 and 300,000, over 5,000 Chinese businesses, and more than 200 Chinese companies with regional headquarters based in the Jebel Ali Free Zone (JAFZA).⁹ Dubai continues to be a major centre of Chinese social and economic influence in the region; Dubai's ruler Mohamed bin

⁸ On the development of the bilateral relationship, see Jonathan Fulton, "China–United Arab Emirates Relations in the Belt and Road Era", *Journal of Arabian Studies* 9, No. 2 (2019): 253–268.

⁹ On China's Dubai presence, see Yuting Wang, "Making Chinese Spaces in Dubai: A Spatial Consideration of Chinese Transnational Communities in the Arab Gulf States", *Journal of Arabian Studies* 9, No. 2, (2019): 269–287; Yuting Wang, *Chinese in Dubai: Money, Pride, and Soul-Searching* (Brill, 2020).

Rashed al Maktoum travelled to Beijing for the Belt and Road Forum in 2019 and signed US\$3.4 billion worth of deals for Chinese investment in JAFZA.¹⁰ However, as the China-UAE relationship has grown to include more strategic considerations, the capital city of Abu Dhabi has come to play a more prominent role.

“In 2016 China’s COSCO Shipping signed a 35-year concession agreement ... that doubled the container handling capacity of [Khalifa] port.”

This is evident in the deeper levels of Chinese engagement in the KIZAD/KPFTZ complex. In 2016 China’s COSCO Shipping signed a 35-year concession agreement with KIZAD, an investment valued at US\$738 million that doubled the container handling capacity of the port.¹¹ In early 2018 a consortium from Jiangsu province announced that over 15 Chinese companies had signed deals in KPFTZ worth over

¹⁰ “Sheikh Mohammed announces \$3.4bn investment in Dubai via China’s Belt and Road Initiative”, *The National*, 26 April 2019, <https://www.thenationalnews.com/uae/government/sheikh-mohammed-announces-3-4bn-investment-in-dubai-via-china-s-belt-and-road-initiative-1.854063>

¹¹ Anthony McAuley, “China’s Cosco to build and operate new container terminal at Khalifa Port”, *The National*, 28 September 2016, <https://www.thenationalnews.com/business/chinas-cosco-to-build-and-operate-new-container-terminal-at-khalifa-port-1.201120>

US\$1.1 billion across the construction, manufacturing, and trade and logistic sectors.¹²

“US officials warned that a Chinese military presence in the Emirates would jeopardise the proposed sale of F-35 fighter aircraft to the UAE.”

China’s involvement in Khalifa Port took an interesting turn in 2021, when the *Wall Street Journal* reported that China was building a military facility there.¹³ This was followed by a burst of activity in Washington: a congressional hearing was held that August that explicitly discussed the strategic implications of China-UAE relations, with a Pentagon official, Dana Stroul, saying, “We understand that there will be an economic or trade relationship with China, just like the United States has, but there are certain categories of activities or engagement that our partners may be considering with China that, if they do, will pose a risk to US defense technology, other kinds of technology, and ultimately force protection.”¹⁴ US officials warned that a Chinese military presence

¹² “Chinese companies to invest \$1bn in Khalifa Port free trade zone”, *Emirates* 24/7, 20 April 2018, <https://www.emirates247.com/business/chinese-companies-to-invest-1bn-in-khalifa-port-free-trade-zone-2018-04-20-1.668346>

¹³ Warren P. Strobel and Nancy A. Youssef, “F-35 sale to U.A.E. imperiled over US concerns about ties to China”, *The Wall Street Journal*, 25 May 2021, <https://www.wsj.com/articles/f-35-sale-to-u-a-e-imperiled-over-u-s-concerns-about-ties-to-china-11621949050>

¹⁴ Joel Gehrke, “US warns Middle East Allies not to give china a military base”, *The Washington Examiner*, 10 August 2021, <https://www.washingtonexaminer.com/policy/defense/national-security/us-warns-middle-east-china-base>

in the Emirates would jeopardise the proposed sale of F-35 fighter aircraft to the UAE.¹⁵ Emirati officials, for their part, publicly voiced concerns about how US-China competition adversely affects their interests.

“In February 2022 the UAE announced that it was planning to buy a dozen L-15 jet trainers from the China National Aero-Technology Import and Export Corporation, with the possibility of expanding the deal to 36 jets.”

Subsequently, in November 2021 the *Wall Street Journal* reported that construction of the Chinese facility had been stopped,¹⁶ although Emirati officials denied that there was a military purpose; presidential adviser Anwar Gargash said, “The UAE’s view was that these certain facilities in no way could be construed as military facilities.”¹⁷ Shortly after the UAE announced it was no longer pursuing the F-35 deal, claiming concerns of “technical requirements, sovereign operational

¹⁵ Strobel and Youssef, “F-35 Sale to U.A.E. Imperiled”.

¹⁶ Gordon Lubold and Warren P. Strobel, “Secret Chinese port project in Persian Gulf rattles US relations with UAE”, *The Wall Street Journal*, 19 November 2021, <https://www.wsj.com/articles/us-china-uae-military-11637274224>

¹⁷ Mostafa Salem, Jennifer Hansler, and Celine Alkhaldi, “UAE suspends multi-billion dollar weapons deal in sign of growing frustration with US-China showdown”, CNN, 15 December 2021, <https://edition.cnn.com/2021/12/14/middleeast/uae-weapons-deal-washington-china-intl/index.html>

restrictions, and cost/benefit analysis.”¹⁸ Whatever role Chinese involvement had in the deal collapsing, it is clear that the United States has real concerns about China-UAE ties advancing beyond the economic realm. It is worth noting that in February 2022 the UAE announced that it was planning to buy a dozen L-15 jet trainers from the China National Aero-Technology Import and Export Corporation, with the possibility of expanding the deal to 36 jets.¹⁹

Duqm, Oman

Duqm is a port on Oman’s long Arabian Sea coastline, making it an especially attractive project. An industrial/energy/shipping complex here, if connected to other Arabian peninsula cities and facilities, would offer an alternative access point to Gulf energy that is not reliant on the Hormuz Strait. This would allow Gulf energy producers to lessen their vulnerability to Iranian threats to close that major chokepoint. To this end, the Omani government has been trying to access foreign capital since the early 2000s to develop the port/park complex.²⁰ In this regard, the MSRI offered an opportunity, based on long-standing economic relations between China and Oman.

In 2017, Chinese firms, mostly from Ningxia province and in cooperation with the PRC government, signed several major MoUs with the Duqm Special Economic Zone Authority (SEZAD). This complex

¹⁸ Mostafa Salem, Jennifer Hansler, and Celine Alkhaldi, “UAE suspends multi-billion dollar weapons”.

¹⁹ Agnes Helou, “UAE to buy a dozen Chinese L-15 trainer aircraft”, *DefenseNews*, 25 February 2022, <https://www.defensenews.com/air/2022/02/25/uae-to-buy-a-dozen-chinese-l-15-trainer-aircraft/>.

²⁰ Eric Staples, “The Ports of Oman Today”, in *The Ports of Oman*, ed. Abdulrahman Al Salimi and Eric Staples (Georg Olms Verlag, 2017), 362.

includes both Duqm port and the China-Oman Industrial Park, which was designed to house the many projects agreed to in the MoUs. The announced projects included a US\$2.8 billion contract to build a methanol plant, US\$406 million for a power plant, and a US\$94 million solar panel plant.²¹ Other projects would include residential housing complexes, schools, and retail complexes. All told, the commitments totalled US\$10.7 billion, representing a major potential Chinese presence.²²

“Oman, with a very weak economy, perhaps made less sense as a destination for Chinese foreign direct investment.”

Since then, however, there has been little momentum. Initial projections had 30 per cent of the Chinese projects being completed by 2022, but the first factory in the China-Oman Industrial City opened only in October 2021.²³ What accounts for the chasm between the MoUs and project completion? For one, China’s overseas lending started to drop substantially after a BRI peak in 2016 as its financial institutions’

²¹ Fulton, “Domestic Politics as Fuel for China’s Maritime Silk Road Initiative”, 186–7.

²² Nawied Jabarkhly, “Oman counts on Chinese billions to build desert boomtown”, Reuters, 5 September 2017, <https://www.reuters.com/article/us-oman-china-investment-idUSKCN1BG1WJ>

²³ “First factory to open at China-Oman Industrial City in Duqm”, *Times of Oman*, 23 October 2021, <https://timesofoman.com/article/108381-first-factory-to-open-at-china-oman-industrial-city-in-duqm>

appetites for risky overseas projects did not match the hype of the BRI.²⁴ Oman, with a very weak economy, perhaps made less sense as a destination for Chinese foreign direct investment. Omani domestic considerations also may have been at play. Oman's exports to China represented 46 per cent of its total exports in 2019, creating an uncomfortable dependency.²⁵ In 2017 the Omani government had to borrow US\$3.55 billion from Chinese banks in order to cover the federal budget.²⁶ This debt, on top of the trade imbalance and large number of Chinese investments, may have been a concern among Omani leaders.

At the same time, the PLAN has long used the Omani port in Salalah for comprehensive replenishment and rehabilitation during its deployment in the United Nations counterpiracy mission in the Gulf of Aden. Early in the mission, Salalah was the port that PLAN ships docked most frequently in.²⁷ Therefore, support for China's maritime goals may not require the development of new ports and park facilities in Oman.

Jizan, Saudi Arabia

After signing a comprehensive strategic partnership agreement during Xi Jinping's state visit in January 2016, a joint venture company, Silk Road Industrial Services, was established by Chinese and Saudi entities to pull

²⁴ Derek Scissors, "China's global business footprint shrinks", American Enterprise Institute, 10 July 2019, <https://www.aei.org/research-products/report/chinas-global-business-footprint-shrinks/>

²⁵ Central Intelligence Agency, *The World Factbook: Oman*. (Continuously updated.)
²⁶ "Oman signs \$3.55 Billion loan with Chinese banks", Reuters, 3 August 2017, <https://www.reuters.com/article/oman-loan-idUSL5N1KP2XX>

²⁷ Daniel J. Kostecka, "Places and Bases: The Chinese Navy's Emerging Support Network in the Indian Ocean". *Naval War College Review* 64, No. 1 (2011), 65.

investors into the Chinese Industrial Park, housed in JCPDI.²⁸ Located on the kingdom's west coast, Jizan offers yet another potentially strategic access point for China's MSRI ambitions in MENA. It was designated as a key industrial park by the Chinese government, giving the project political weight in the PRC.²⁹

“The kingdom is consistently China's largest economic partner in the MENA region and leaders in both countries have articulated plans for deeper policy alignment.”

As in Duqm, a major comprehensive industrial zone was planned, with heavy and light industrial manufacturing projects as well as residential and commercial projects announced. And, in another commonality with its Omani counterpart, there has been little in the way of completion. At the time of writing, the most significant development has been a US\$3.8 billion petrochemicals plant built by Pan-Asia PET Resin Co, a company from Guangzhou.³⁰ A significant difference, however, is that China and Saudi Arabia have a comprehensive strategic partnership agreement with deep political and economic momentum.

²⁸ Jonathan Fulton, “Situating Saudi Arabia in China's Belt and Road Initiative”, *Asian Politics & Policy* 12, No. 3 (2020): 362–383.

²⁹ Zhishi Yang, Le Du and Liping Ding, “The China-Saudi Arabia (Jizan) Industrial Park under the Belt and Road Initiative”, *Asian Journal of Middle Eastern and Islamic Studies* 14, No. 4 (2020), 534.

³⁰ Li Wenfang, “Pan-Asia's Saudi project to break ground next March”, *China Daily*, 27 June 2017, https://www.chinadaily.com.cn/business/2017-06/27/content_29896950.htm

The kingdom is consistently China's largest economic partner in the MENA region and leaders in both countries have articulated plans for deeper policy alignment, meaning there is a much greater likelihood that Jizan projects will come to fruition.

Djibouti

As the site of China's first overseas military installation, Djibouti is an important component in the PRC's regional maritime strategy. The PLAN first deployed an anti-piracy task force to the Gulf of Aden/Horn of Africa region in 2008, and in 2017 opened what it referred to as a logistics centre in support of this ongoing mission. Djibouti's strategic location in a maritime transit corridor that is crucial to Chinese trade, combined with the fact that many other countries have military facilities there, meant that the PLAN's presence was not unusual, other than for the fact that China had not developed an overseas base before then.³¹ China's 2015 White Paper on Military Strategy emphasized the need to "develop a modern maritime military force structure commensurate with its national security and development interests" and added that the PLAN would play a larger role in protecting strategic sea lines of communication.³² This was folded into the 2W2W framework the following year.

³¹ On China's presence in Djibouti, see David Styan, "China's Maritime Silk Road and Small States: Lessons from the Case of Djibouti", *Journal of Contemporary China* 29, No. 122 (2020): 191–206; Benjamin Barton, "Agency and Autonomy in the Maritime Silk Road Initiative: An Examination of Djibouti's Doraleh Container Terminal Disputes", *The Chinese Journal of International Politics* 14, No. 3 (2021): 353–380.

³² State Council of the People's Republic of China, "China's Military Strategy", 27 May 2015, http://english.www.gov.cn/archive/white_paper/2015/05/27/content_281475115610833.htm

Ain Sokhna and Port Said, Egypt

The Suez Economic and Trade Cooperation Zone (SETC-Zone) is in Ain Sokhna, on the Red Sea and 120 kilometres from Cairo. Established in 2008, five years before the announcement of the BRI, it has been described as “the flagship project of China-Egypt cooperation within the BRI framework”.³³ Strategically located on the Suez, it has become a major hub for Chinese manufacturing, and China is the largest investor in the Suez Canal corridor. The SETC-Zone is in the process of developing nine industrial zones and Chinese firms have been actively establishing an industrial production base, involving textiles, vehicle manufacturing, and consumer electronics manufacturing. This industrial development is aligned with substantial Chinese construction in Egypt: between 2005 and 2021 Chinese firms earned US\$19 billion in construction contracts in Egypt,³⁴ including the 80-storey Iconic Tower in the central business district of Egypt’s new administrative capital. The SETC-Zone has received foreign direct investment from TEDA Investment Holding Co. Ltd, a Chinese state-owned enterprise.

Haifa, Israel

While not included in the 2W2W framework, Haifa has become another important Chinese port city in MENA. Bayport terminal, a US\$1.7 billion project, opened in September 2021 and is operated by Shanghai International Port Group (SIPG) with a 25-year agreement. The new

³³ John Calabrese, “Towering ambitions: Egypt and China building for the future”, Middle East Institute (Washington, DC), 6 October 2020, <https://www.mei.edu/publications/towering-ambitions-egypt-and-china-building-future>

³⁴ American Enterprise Institute, *China Global Investment Tracker* (Continuously updated.)

port allows Haifa to dock larger classes of cargo ships, important for a country that relies on overseas shipping to move approximately 99 per cent of its imports and exports.³⁵ This capacity is important for Israel because previously its ports could only handle smaller ships and the country frequently experienced seaport traffic jams that resulted in delays costing the Israeli economy approximately US\$218 million every month.³⁶

“Haifa has an especially significant impact on the regional strategic landscape, however, and is another example of a pressure point between the United States and an important regional ally.”

For China, having another access point on the Mediterranean coast supports its trade with the European Union. The connecting infrastructure that Israel is planning, including the Red-Med railway and the “Tracks for Regional Peace” rail line that would connect Haifa to the

³⁵ “Israel opens Chinese-operated port in Haifa to boost regional trade links”, Reuters, 2 September 2021, <https://www.reuters.com/world/middle-east/israel-opens-chinese-operated-port-haifa-boost-regional-trade-links-2021-09-02/>

³⁶ Ricky Ben-David, “Israel inaugurates Chinese-run Haifa Port terminal, in likely boost for economy”, *The Times of Israel*, 2 September 2021, <https://www.timesofisrael.com/israel-inaugurates-new-haifa-port-terminal-in-expected-boost-for-economy/>

Gulf Cooperation Council (GCC) countries via Jordan, will also benefit China's BRI ambitions of cross-regional connectivity.³⁷

“The Biden administration has continued to voice concerns about Chinese penetration of the Israeli economy, especially in the technology sector and in critical infrastructure.”

Haifa has an especially significant impact on the regional strategic landscape, however, and is another example of a pressure point between the United States and an important regional ally. Haifa regularly hosts joint drills between the US and Israeli navies, and the US Navy's Sixth Fleet frequently docks there. As the Bayport project came closer to completion, the Trump administration lobbied the Israeli government to stop SIPG from managing the port, with rumours at one point that the Sixth Fleet might stop using Haifa as a port of call,³⁸ and then later requesting that the US Coast Guard be allowed to inspect the port for Chinese surveillance capabilities — a request that was denied by the Israeli government.³⁹ The Biden administration has continued to voice

³⁷ “Israel to begin promoting railway linking Haifa seaport with Saudi Arabia”, *The Times of Israel*, 24 June 2018, <https://www.timesofisrael.com/israel-to-begin-promoting-railway-linking-haifa-seaport-with-saudi-arabia/>

³⁸ Michael Wilner, “US navy may stop docking in Haifa after Chinese take over port”, *Jerusalem Post*, 15 December 2018, <https://www.jpost.com/israel-news/us-navy-may-stop-docking-in-haifa-after-chinese-take-over-port-574414>

³⁹ “Report: Israel turned down US request to inspect Haifa Port after deal with China”, *Al Monitor*, 1 February 2021, <https://www.al-monitor.com/originals/2021/02/israel-china-haifa-port-inspection.html>

concerns about Chinese penetration of the Israeli economy, especially in the technology sector and in critical infrastructure. A report from Tel Aviv University's Institute of National Security Studies acknowledged the challenges Bayport presents: "Under the reasonable assumption that the direct risks potentially arising from Bayport's operation can be handled prudently and responsibly by Israel's security authorities, the most significant challenge still remains, namely, the implications for relations with the United States."⁴⁰

Conclusion

All told, China has been developing a deep commercial presence in ports and industrial parks that link the Persian Gulf to the Arabian, Red and Mediterranean Seas. These projects underscore the importance of the Arabian peninsula and Red Sea for the BRI. Approximately 90 per cent of global trade moves by sea, and the value of maritime trade is projected to triple by 2050.⁴¹ These ports and parks represent the essence of the BRI's cross-regional connectivity. With the exception of the PLAN's support base in Djibouti, none of these has any military application yet. However, each of the six countries included here has dense security cooperation agreements with the United States, and the state of the US-China relationship is a factor to consider. During the Trump administration the United States shifted its foreign policy focus from counterterrorism to great power competition, describing China and Russia as the primary threats. This new focus has continued during the

⁴⁰ Galia Lavi and Assaf Orion, "The Launch of the Haifa Bayport Terminal: Economic and Security Considerations", The Institute for National Security Studies, 12 September 2021, <https://www.inss.org.il/publication/haifa-new-port/>.

⁴¹ Organization for Economic Co-Operation and Development, *Ocean Shipping and Shipbuilding* (Continuously updated.)

Biden administration, although it uses the designation of strategic competition. As a result, Washington has applied considerable pressure on allies and partners to reconsider engagement with China in areas it deems sensitive, such as cooperating with Huawei on 5G telecommunication technology or allowing Chinese companies to manage critical infrastructure. As described above, such pressure has already added to tension in the US-UAE relationship. Similar dynamics are at play in Israel and Saudi Arabia.

Notwithstanding Washington's suspicions of Beijing's agenda, the latter, in working closely with US allies and partners in MENA, is not seeking to undermine the US presence and influence in the region. On the contrary, China's economic interests prize stability, and its approach to the Middle East in fact supports rather than challenges the existing regional order. ♦

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European Maritime Strategies for the Middle East

Struggling for Relevance?

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From trade to energy, the Middle East is undergoing profound geopolitical change that will affect European maritime interests. Russia's war on Ukraine and the United States' shift to the Indo-Pacific are likely to accelerate this shift. In this context, this article analyses the European maritime approach to the Middle East. It shows how Europe is finding it difficult to simultaneously balance its interests in different maritime regions such as the Mediterranean, the Gulf region and the Indo-Pacific. Furthermore, it reveals how the European Union's maritime strategy and policies are still fragmented and severely undermined by a lack of naval assets.

As a major trade actor, the European Union is highly dependent on maritime routes. The main goods imported to Europe by sea include petroleum products (34.2 per cent in 2020), chemicals (7.4 per cent), metal ores (7.2 per cent) and agricultural and food products (11.6 per cent).¹ The Suez Canal, Red Sea, Gulf of Aden and

¹ Eurostat, "Maritime Freight and Vessels Statistics", December 2021, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Maritime_ports_freight_and_passenger_statistics&oldid=218671#Most_EU_maritime_freight_transport_is_with_extra-EU_partners.

the Mediterranean are vital maritime transit routes for EU goods exported to the Indo-Pacific region. In this sense, the hubs and ports in the Middle Eastern countries along these routes are vital to sustaining Europe's trade and economic position. Even though the lockdowns and economic dislocations arising from the Covid-19 pandemic have affected maritime transport and shipping volumes, Europe continues to have a high dependency on the Middle East for its maritime trade. However, in addition to clear economic reasons for engaging the Middle East, there are security reasons as well: the maritime routes pass through contested zones (e.g., the Strait of Hormuz) or areas with known chokepoints (e.g., the Suez Canal) and are therefore highly vulnerable, as are the hubs and ports located in the littoral states.

“Should Europe seriously curtail its dependence on Russian oil and gas supplies in favour of alternatives from the Middle East, the region will only grow in geostrategic importance for Europe.”

Indeed, no discussion of Europe's economic and trade relationship with the Middle East can avoid a reflection on the geopolitical undercurrents of the region. Most obviously, there are still unresolved conflicts in Libya, Syria and Yemen, and there is endemic instability in countries such as Iraq and Lebanon. Europe has an uncomfortable and complicated relationship with a number of countries in the region, starting with Turkey and extending to Saudi Arabia and Iran. The Europeans also are concerned that the energy transition away from fossil fuels may have a destabilising effect on socioeconomic

systems in the Middle East. Notwithstanding these circumstances, the United States is seen to have declining interest in the Middle East even as the region is increasingly of interest to Europe's strategic competitors, Russia and China. Russia's ongoing war on Ukraine complicates the picture, including by disrupting maritime trade and shipping through the Black Sea and the Middle East. Furthermore, should Europe seriously curtail its dependence on Russian oil and gas supplies in favour of alternatives from the Middle East, the region will only grow in geostrategic importance for Europe.

This article will outline the importance of maritime access to the Middle East and the Gulf for European economies and discuss the Europeans' ambitious maritime agenda in the Middle East. It will focus on Europe's major maritime commercial interests in the region and assess the approach of business actors in the region. Finally, the article will analyse the security and geopolitical dimensions of Europe's engagement in the Mediterranean and the wider Middle East.

A European Maritime Strategy for Commerce in the Middle East?

Europe's maritime engagement with the Middle East is based largely on a commercial rationale. "Europe" is used here to refer not only to EU institutions but also the range of shipping and maritime actors that have vested interests in trade with and transit through the region. With Maersk, MSC, CMA CGM Group and Hapag-Lloyd, Europe is home to some of the world's largest shipping firms — Maersk is the largest

shipping company in the world.² Since 2010, the European Union has witnessed an increase in the volume of loaded containers handled in European ports despite the economic shocks caused by the pandemic in 2020.³ The Middle East is an indispensable region for the European Union's maritime trade.⁴ The region is important in its own right because it exports and imports goods to and from the European Union. For example, Egypt and Turkey are notable trade partners in the region, but Iraq (accounting for 9 per cent of the European Union's total oil imports in 2019) and Saudi Arabia (accounting for 8 per cent of the union's total oil imports) are essential as well.⁵ These trends are likely to increase given the war on Ukraine and global restrictions on oil and gas supplies from Russia, with the Middle East seen as an obvious candidate to make up for the energy supply shortfalls.

As the European Union's 2014 Maritime Security Strategy outlines, the "EU depends on open, protected and secure seas and oceans for economic development, free trade, transport, energy security,

² Ship Technology, "The World's Biggest Shipping Companies in 2020", 19 October 2020, <https://www.ship-technology.com/features/the-ten-biggest-shipping-companies-in-2020/>.

³ Eurostat, "Maritime Freight and Vessels Statistics", December 2021, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Maritime_ports_freight_and_passenger_statistics&oldid=218671#Most_EU_maritime_freight_transport_is_with_extra-EU_partners.

⁴ See, "Maritime Trade and its Risks: EU's Imports from Asia and the Middle East", IHS Markit, 2 July 2020, <https://ihsmarkit.com/research-analysis/maritime-trade-and-risks-eu-imports-from-asia-and-middle-east.html>.

⁵ Eurostat, "From where do we import energy?", n.d., [https://ec.europa.eu/eurostat/cache/infographs/energy/bloc-2c.html#:~:text=In%202019%2C%20almost%20two%20thirds,and%20Norway%20\(bot h%207%20%25\)](https://ec.europa.eu/eurostat/cache/infographs/energy/bloc-2c.html#:~:text=In%202019%2C%20almost%20two%20thirds,and%20Norway%20(bot h%207%20%25).).

tourism and good status of the marine environment”.⁶ Yet not all European states have the same approach to maritime policy. Some European states are land-locked or they rely mainly on short sea shipping routes to sustain intra-EU trade. In this respect, such states may be more concerned with maritime security within the European Union. Their concerns are in contrast with those EU member states that depend on global maritime shipping or are home to global shipping companies. Accordingly, the differences of opinion between European states hinge on whether they consider the Middle East an end destination for their goods or as largely a transit zone.

The differences of opinion between European states hinge on whether they consider the Middle East an end destination for their goods or as largely a transit zone.

Either way, the Middle East is an important geographical zone for Europe’s management of supply chains. For example, major European shipping companies increasingly invest in the Middle East as a pivot region for their wider trade with Asia. That is why some companies are investing in storage infrastructure or hubs in places such as Port Said, Egypt, or Port Salalah, Oman.⁷ Increasingly, commercial shipping lines

⁶ Council of the European Union, “EU Maritime Security Strategy”, 11205/14, 24 June 2014, p. 2, <https://data.consilium.europa.eu/doc/document/ST%2011205%202014%20INIT/EN/pdf>.

⁷ See for example, Maersk, “Maersk revamps Europe to Middle East & Indian Subcontinent Network”, 7 August 2020,

see the Middle East as a key location to achieve freight integration, with a focus on maintaining supply chain logistics that support maritime trade (i.e., supply chain service integration). Many of the major ports in the Middle East are state-owned, but even in such cases there is an appreciation of the need for public–private partnership arrangements. For example, the Saudi Ports Authority is planning to award concessions on a private–public partnership model to build and operate general cargo and other services in eight multi-purpose terminals across eight ports in the country.⁸

“The Middle East is an important geographical zone for Europe’s management of supply chains.”

Investments in maritime-related sectors is another crucial aspect of Europe’s engagement with the Middle East. To this end, the European Investment Bank (EIB) has invested approximately €1.79 billion in the development of marine transport infrastructure, sanitation, climate resilience and energy projects in countries such as Israel, Jordan and Lebanon.⁹ Separately, the European Bank for Reconstruction and Development (EBRD) also has invested some €10.5 billion in the

<https://www.maersk.com/news/articles/2020/08/07/maersk-revamps-europe-to-middle-east-and-indian-subcontinent-network>.

⁸ Hellenic Shipping News, “Saudi Ports Authority invites companies to qualify for Priority Concessions Procurement PPP Project”, 13 January 2022,

<https://www.hellenicshippingnews.com/saudi-ports-authority-invites-companies-to-qualify-for-priority-concessions-procurement-ppp-project/>.

⁹ European Investment Bank, “EIB in the Mediterranean Partner Countries”,

<https://www.eib.org/en/projects/regions/med/index.htm>.

southern and eastern Mediterranean regions. Although the EBRD is not an EU body, its investment role, along with the investments of the EIB, gives us a clear indication that European states and institutions are prioritising energy transition and transportation in the Middle East. In certain cases, the investments of both the EBRD and the EIB have also sought to relate the question of energy transition and climate change with migration. For example, the EIB's 2021 Climate Adaptation Plan specifically targets financial support for basic urban services such as housing, sanitation, energy, transport and water in vulnerable countries, particularly in cities that are likely to host displaced people, migrants or refugees.¹⁰

“Commercial shipping firms and navies will have to contend with growing hybrid maritime threats in the region.”

However, investments and maritime surveillance will not be enough to deal with the evolving maritime threat landscape in the Middle East. In this respect, commercial shipping firms and navies will have to contend with growing hybrid maritime threats in the region. This can be best seen in the growing use of unmanned vehicles to achieve political objectives at sea. As has been well documented, the attack on the Mercer Street merchant vessel in 2019 by Iran saw the use of military-grade

¹⁰ European Investment Bank, “The EIB Climate Adaptation Plan: Supporting the EU Adaptation Strategy to Build Resilience to Climate Change”, 2021, p. 25, https://www.eib.org/attachments/publications/the_eib_climate_adaptation_plan_en.pdf.

explosives delivered by unmanned vehicles, which resulted in the death of several seamen.¹¹ Such developments have implications for navies and commercial shipping firms. This is not to say that commercial operators are strangers to the risks of maritime transportation, for there is a long history of commercial adaptation to piracy hotspots in the Gulf of Aden and Gulf of Oman. However, what these new risks imply is closer collaboration between commercial authorities, maritime authorities and navies.

A European Maritime Strategy for Security in the Middle East?

Aside from commercial interests, and perhaps chiefly because of them, Europe has a vested interest in the maritime security of the Middle East region. By “Europe” we mean here the collective actions of the European Union, NATO and individual European states. For example, the European Union’s naval operation, Operation Irini, has attempted — admittedly with mixed success — to enforce the UN arms embargo on Libya (UNSC Resolution 2578) by operating in the high seas of the Mediterranean. Since taking over from a previous EU naval operation (Operation Sophia) in March 2020, Operation Irini, with its limited mandate and lack of naval resources,¹² has sought to monitor information on illicit exports of oil from Libya as well as train the Libyan

¹¹ For more details, see H. Decis and C. Le Breton, “A New Phase in the Gulf Shipping Threat?”, IISS Military Balance Blog, 24 September 2021, <https://www.iiss.org/blogs/military-balance/2021/09/a-new-phase-in-the-gulf-shipping-threat>.

¹² H. Decis and A. Lapo, “Operation Irini: EU’s Latest Libya Mission Short on Assets”, IISS Military Balance Blog, 17 July 2020, <https://www.iiss.org/blogs/military-balance/2020/07/operation-irini-eu-libya-mission-assets>.

coast guard and navy and disrupt human smuggling and trafficking networks.¹³ As far as NATO is concerned, Standing NATO Maritime Group Two (SNMG2) ensures the alliance's presence in the Mediterranean. Since 2016, this group has played an important role in NATO's Operation Sea Guardian and tasks such as counterterrorism at sea, capacity building and maritime situational awareness.

“Aside from commercial interests, and perhaps chiefly because of them, Europe has a vested interest in the maritime security of the Middle East region.”

Additionally, in response to at-sea harassment of commercial vessels by Iran in the Strait of Hormuz and wider Gulf region since 2019, a group of European states — outside the European Union and NATO frameworks — launched an initiative labelled the “European Maritime Awareness in the Strait of Hormuz” (EMASOH). A major part of the EMASOH initiative has been a naval deployment called Operation Agénor, which involves eight European countries and seeks to ensure safe passage for commercial vessels in the region. In many respects, a similar approach has been the focus of the EU's naval deployment Operation Atalanta, which has successfully reduced piracy in the wider Horn of Africa region. Since its inception in December 2008,

¹³ EUNAVFOR MED Operation IRINI, “About Us”, <https://www.operationirini.eu/about-us/>.

Operation Atalanta has protected more than 1,500 World Food Programme vessels and helped to detain over 170 pirates.¹⁴

“The European Union is planning for a more consistent presence in the northwestern Indian Ocean, which is a key conduit for maritime security in the broader Middle East region.”

Beyond countering piracy, Operation Atalanta has conducted wider maritime surveillance tasks in the Horn of Africa region. The same can be said for Operation Agénor. Indeed, maritime surveillance and maritime capacity building have become the hallmarks of European naval engagement in the wider Middle East region. For example, from 2015 to 2019 the European Union established a Maritime Capacity Building Initiative (CRIMARIO I) to focus on the western Indian Ocean, but since 2020 this has evolved into adopting a wider focus on the Indo-Pacific through CRIMARIO II. Relatedly, this initiative, which will last until 2024, has given life to a regional information-sharing platform (IORIS) that brings together 19 national and regional maritime authorities. Since 2018, IORIS has facilitated exchange of information between Jordan, Saudi Arabia, Djibouti and a range of states in the Indo-Pacific.¹⁵

¹⁴ EUNAVFOR MED Operation Atalanta, “Key facts and figures”, <https://eunavfor.eu/>.

¹⁵ EU Crimario, “The IORIS Platform”, <https://www.crimario.eu/en/information-sharing/the-ioris-platform/>.

The European Union is also planning for a more consistent presence in the northwestern Indian Ocean, which is a key conduit for maritime security in the broader Middle East region. On 21 February 2022, the European Union announced the planned expansion into the Indian Ocean of a concept known as the Coordinated Maritime Presences (CMP) concept, which was earlier trialled in the Gulf of Guinea. In line with its broader Indo-Pacific Strategy (adopted in September 2021), the CMP in the northwestern Indian Ocean will enhance the European Union's naval presence, partnerships and maritime security efforts in the region. The CMP will initially be present in the northwestern Indian Ocean until February 2024, and it will cover “an area from the Strait of Hormuz to the Southern Tropic and from the north of the Red Sea towards the centre of the Indian Ocean” through increased maritime surveillance and naval presence.¹⁶

The Maritime Challenges Facing Europe

Despite Europe's collective efforts, however, there are a number of challenges to its role in maritime security in the Middle East. Firstly, there is a very clear mismatch between Europe's frameworks for maritime cooperation and the naval assets available for this purpose. As noted earlier, Operation Irini has under-performed because of political disagreement between EU member states and a lack of deployable naval assets. The reality for Europe is that no amount of maritime frameworks and operations (Irini, Agénor, CMP, etc.) can substitute the development

¹⁶ Council of the European Union, “Council Conclusions on the Implementation of the Coordinated Maritime Presences Concept in the North-Western Indian Ocean”, 6255/22, 21 February 2022, <https://www.consilium.europa.eu/media/54437/st06255-en22.pdf>.

and deployment of naval vessels. One study shows that from 1999 to 2018 European navies experienced a 30 per cent drop in the total number of available frigates and destroyers and more than 20 per cent of available submarines.¹⁷ Such cuts, deep in themselves, are drastic, considering that they are taking place when greater demands have been placed on navies. For example, countries such as France have historically witnessed a decline in available naval platforms but an increase in operations in the Gulf region and the Indo-Pacific.

“A lack of naval mass, as well as the strategic enablers that make naval platforms effective military assets, is likely to hurt European navies in the future.”

A lack of naval mass, as well as the strategic enablers that make naval platforms effective military assets (e.g., advanced radars and sensors, missiles, space-based assets and subsea vehicles), is likely to hurt European navies in the future.¹⁸ While some European navies are investing in new platforms such as submarines and nuclear-capable/powered naval platforms, the demands on Europe's navies will

¹⁷ C. Major and C. Mölling, “The EU's Military Legacy: Over-Institutionalised, Under-equipped and Strategically Divided”, in *The CSDP in 2020: The EU's Legacy and Ambition in Security and Defence*, ed. D. Fiott (EU Institute for Security Studies, 2020), p. 43, https://www.iss.europa.eu/sites/default/files/EUISSFiles/CSDP%20in%202020_0.pdf.

¹⁸ J. Stöhs, *The Decline of European Naval Forces: Challenges to Sea Power in an Age of Fiscal Austerity and Political Uncertainty* (US Naval Institute Press, 2018).

only increase in an era of high-intensity conflict.¹⁹ Without investments in appropriate numbers of naval platforms, and given the increasing need to focus on maritime deterrence in and around Europe because of Russia's belligerence, the bandwidth that European governments may have to dedicate to maritime security in the Middle East could be lower than even today's levels.

“The lack of a comprehensive and lasting regional maritime security architecture makes it difficult for European states to fully engage Middle Eastern states.”

Second, the lack of a comprehensive and lasting regional maritime security architecture makes it difficult for European states to fully engage Middle Eastern states.²⁰ Maritime security in the region is dealt with on a mainly bilateral or minilateral basis, and any regional structure is bedevilled by political rivalry and mistrust between states. What is more, Middle Eastern states still prefer to organise their maritime security efforts in partnership with the United States rather than with the European Union or NATO. In January 2022, the secretary general of the Gulf Cooperation Council (GCC), Nayef Al-Hajraf, called

¹⁹ P. Morcos and C. Wall, “Are European navies ready for high-intensity warfare?”, War on the Rocks, 31 January 2022, <https://warontherocks.com/2022/01/are-european-navies-ready-for-high-intensity-warfare/>.

²⁰ C. Adebahr, “Collective Security in the Persian Gulf: Preparing for an Opening”, Carnegie Endowment (Europe), 20 July 2021, <https://carnegieeurope.eu/2021/07/20/collective-security-in-persian-gulf-preparing-for-opening-pub-84959>.

for closer maritime cooperation with Washington.²¹ Such calls reflect a familiar pattern of maritime security cooperation for the GCC states.

“Maritime security in the region is dealt with on a mainly bilateral or minilateral basis, and any regional structure is bedevilled by political rivalry and mistrust between states.”

Indeed, as a distinct initiative from EMASOH and Operation Agénor, the United States set up the International Maritime Security Construct (IMSC) in November 2019. It may appear peculiar that two distinct operations, the IMSC and EMASOH, both operate in the same region and with similar objectives. The reason for the duplication can be traced back to transatlantic disagreements over Iran during the Trump presidency, with the United States — unlike its European counterparts — wanting to scrap the Iran nuclear deal. Nevertheless, like EMASOH, the IMSC is geared towards ensuring freedom of navigation in the Persian Gulf, but, unlike EMASOH, it includes regional states such as Bahrain, Saudi Arabia and the United Arab Emirates (UAE) in addition to the United States, United Kingdom, Albania, Estonia and Lithuania. At the sharp end of IMSC is the Coalition Task Force (CTF) Sentinel. Bear in mind that Combined Maritime Forces has been present in the region since 2001 and has seen 34 nations — including 11 European countries — cooperate through four CTFs in the region. The European

²¹ Kuwait News Agency, “GCC eyes deeper maritime security coop with US – Al-HajraP”, 4 January 2022, <https://www.kuna.net.kw/ArticleDetails.aspx?id=3020006&language=en>.

Union and NATO lack a like-for-like set of arrangements with Middle Eastern states on maritime security.

“There is a lack of commonality between the European states themselves on maritime security beyond their shores.”

Third, the difficulty of engaging Middle Eastern states on maritime security is not just a function of disunity and rivalry in the Middle East. Indeed, there is a lack of commonality between the European states themselves on maritime security beyond their shores. For example, in disbanding EU Operation Sophia in favour of Operation Irini, EU member states displayed disagreement on the fundamental rationale for the operation — some believed an EU naval operation should be scrapped entirely as it was viewed as a pull factor for human trafficking. The Europeans can, therefore, be fairly accused of not providing a coherent or robust political mandate for wider naval operations, the lack of which potential partners can obviously detect when assessing whether the European Union can play a meaningful maritime role beyond its shores. Additionally, there are disagreements between European countries on how to handle crises such as that in Libya. Even on the question of Turkey and its disruptive activities in the eastern Mediterranean, there are tensions between EU and NATO members. Countries such as Greece have formed a stronger defence

relationship with France²² while Cyprus, Greece, Israel, Egypt and certain Gulf states have increased their maritime security cooperation outside the scope of NATO and the European Union.²³ Such pragmatic steps should be seen in light of fundamental differences of opinion in European security, with some states prioritising the threat from Russia over Turkey's illegal activities in the eastern Mediterranean.

“There are disagreements between European countries on how to handle crises such as that in Libya.”

Either way, the Europeans are seeking to enhance their maritime presence in the Middle East and wider region. For example, the reflection group tasked with the NATO 2030 Report has already flagged the importance of a more consistent NATO approach to the “South”, including far closer cooperation with the European Union and regional actors such as the GCC, League of Arab States and others on maritime security.²⁴ Such a call is expected to be reiterated in NATO's 2022

²² H. Decis, “France, Greece and Mediterranean Currents”, IISS Military Balance Blog, 22 December 2021, <https://www.iiss.org/blogs/military-balance/2021/12/analysis-france-greece-and-mediterranean-currents>.

²³ Y. Guzansky and G. Lindenstrauss, “The Growing Alignment between the Gulf and the Eastern Mediterranean”, Middle East Institute (Washington), 25 May 2021, <https://www.mei.edu/publications/growing-alignment-between-gulf-and-eastern-mediterranean>.

²⁴ “NATO 2030: United for a New Era — Analysis and Recommendations of the Reflection Group Appointed by the NATO Secretary General”, 25 November 2020, p. 35, https://www.nato.int/nato_static_fl2014/assets/pdf/2020/12/pdf/201201-Reflection-Group-Final-Report-Uni.pdf.

Strategic Concept. For the European Union, the “Strategic Compass”²⁵ — a sort of “white book” on defence that was adopted on 21 March 2022 — also grapples with maritime security and the Middle East. This entails further developing the union’s maritime surveillance apparatus and enhancing the development of naval capability.²⁶ In this respect, the European Union has to find a more effective way of matching its maritime surveillance efforts with key partners in the Middle East, as well as determinedly projecting naval power through a more credible set of naval assets.

Conclusions

This article began with the objective of assessing Europe’s maritime approach to the Middle East from both a commercial and a security perspective. Geography clearly dictates that the Middle East is a vital location for European maritime interests. Not only is the region an important trading partner and key maritime transit region, but it is also the location of a range of geopolitical challenges. Shifts in the patterns of globalisation and energy consumption mean that the Middle East is undergoing profound political challenges that will affect European maritime interests. Russia’s war on Ukraine, plus the United States’ shift towards the Indo-Pacific, will no doubt hasten the importance of the Middle East for the Europeans. Not only will Europe need to respond to

²⁵ Council of the European Union, “A Strategic Compass for Security and Defence — For a European Union that Protects its Citizens, Values and Interests and Contributes to International Peace and Security”, 7371/22, Brussels, 21 March 2022, <https://data.consilium.europa.eu/doc/document/ST-7371-2022-INIT/en/pdf>.

²⁶ D. Fiott, “Naval Gazing: The Strategic Compass and the EU’s Maritime Presence”, EUISS Brief, No. 16, July 2021, https://www.iss.europa.eu/sites/default/files/EUISSFiles/Brief_16_2021.pdf.

challenges such as climate change and migration in the region, but there is a sense in which the Middle East, as a pivot between Europe and Asia, may fast become the terrain on which global strategic competition is played out.

This article has highlighted some of the challenges facing the Europeans and their maritime engagement with the Middle East. First, there is still some degree of disunity among European states on how to deal with certain crises and Middle Eastern governments. This can be seen in their differing approaches to Libya and Turkey, which implies shifting political and security relationships in the region. Second, there is still a lack of clarity over how Europe should balance its maritime interests in the Mediterranean and Gulf regions with its growing aspirations in the Indo-Pacific. While one may argue that the Mediterranean and Indo-Pacific represent a maritime continuum, the varied pressing geopolitical demands (i.e., the territorial security of Europe vs. its global maritime presence) and lack of resources mean that some degree of prioritisation is needed. Third, this article has argued that while the European Union has developed a range of maritime policies that affect its approach to the Middle East, these policies remain fragmented; the union needs to consolidate its energy, infrastructure, maritime security, climate change and ocean governance strategies so that there is an overarching approach. Finally, there can be no credible European maritime strategy for the Middle East without a determined development and deployment of naval assets. ♦

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reflect the views of the European Union or of the EU Institute for Security Studies, where Dr Daniel Fiott was Security and Defence Editor at the time of writing this article.

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Thalassocracies in the Making?

The Case of the UAE and the Western Indian Ocean Region

Brendon J Cannon*

Thalassocracy means “rule of the sea” in Greek. Used in the strategic sense by the naval theoretician Alfred Thayer Mahan, the term refers to states, regions or rulers that control or have dominion over a large expanse of sea or possess naval supremacy either in a commercial or military sense.¹ In short, it describes a political entity that uses its naval and/or merchant fleet to assert its power and unite possessions separated by water.

Examples of historical thalassocracies include Athens, Venice and the Dutch Republic, although the great modern scholar of sea power states, Andrew Lambert, argues that true thalassocracies are the product of conscious cultural and political decisions by the entire society.² As such, thalassocracies understand the power asymmetry in play between a sea power, Great Britain, for example, and a continental hegemon like Napoleonic France. The sea is the source of their power, and

¹ Alfred Thayer Mahan, *The Influence of Sea Power upon History* (Boston: Little, Brown & Company, 1980).

² Andrew Lambert, *Seapower States: Maritime Culture, Continental Empires and the Conflict that Made the Modern World* (Yale University Press, 2018).

thalassocracies, according to Lambert, harness the energies of the entire society around a seafaring culture to maintain autonomy — not to overcome a dominant continental power.

“Thalassocracies, according to Andrew Lambert, harness the energies of the entire society around a seafaring culture to maintain autonomy — not to overcome a dominant continental power.”

The differences between strategic, Mahanian conceptualisations of sea power and those of Lambert, which emphasise a maritime culture, are prescient because some see the emerging contours of a political order driven, in part, by Arab Gulf states. This order (and the power that underpins it) may, in the short or long term, come to resemble historical thalassocracies. At the heart of the matter are the actions of Middle Eastern states in the maritime spaces and the littorals of the Red Sea, the Gulf of Aden and western Indian Ocean.

Middle Eastern states and peoples, particularly those from the Arabian peninsula, have long been involved with their near abroad, particularly on the opposite, African shore of the Red Sea. The growing military and economic engagements of certain states inhabiting the Middle East regional security complex³ such as the United Arab

³ A regional security complex (RSC) is characterised by an intense degree of security interdependence. In

other words, an RSC is “a group of states whose primary security concerns link together sufficiently closely so that their national securities cannot realistically be considered apart from one another.” Barry Buzan, *People, States and Fear: An Agenda for International Security Studies in the Post–Cold War Era* (ECPR Press, 2008), p. 190.

Emirates (UAE), involving ports, bases and concessions, have reportedly resulted in emergent thalassocracies. For example, the UAE's leadership recently "began to make moves that laid the foundations for a new geopolitical order This emerging new maritime order stretches out in a broken continuum of ports, naval bases and strategic locations across the Indian Ocean."⁴

"The growing military and economic engagements of certain states inhabiting the Middle East regional security complex such as the UAE, involving ports, bases and concessions, have reportedly resulted in emergent thalassocracies."

Particularly after the 2008/9 recession, competition between regional actors for this maritime space and littoral ports has led to a race "between Saudi Arabia, the UAE, and Turkey to build naval and military bases right across the Horn of Africa. This threatens to change the naval balance in the north-west Indian Ocean."⁵ The intrigues surrounding the actions of the UAE and other Middle Eastern states involving ports and basing concessions in the region have reportedly "facilitated geopolitical tensions and regional rivalries that risk militarising the region and impacting human security by reinforcing more state-centric conceptions of security concentrated on territorial and border disputes."⁶

⁴ Nisha Mathew, "Old Problems, New Solutions: An Emirati Perspective on the Southern Tier in the Middle East", *Insights* 206, Middle East Institute, NUS, 6 May 2019

⁵ David Brewster, "Base Race in the Horn of Africa", *The Interpreter*, 7 February 2018, <https://www.lowyinstitute.org/the-interpreter/base-race-horn-africa>

⁶ A Kabandula & T M Shaw, "Rising Powers and the Horn of Africa: Conflicting Regionalisms", *Third World Quarterly* 39, no. 12 (2018), 2315–2333.

This article questions these analyses — long on rhetoric and short on facts — and attempts to demonstrate the limited extent to which Middle Eastern states such as the UAE are currently involved in the Horn of Africa and its maritime near abroad.⁷ Relatedly, the article catalogues the UAE's limited capabilities to effectively project power or tap into existing trade networks across the region for the periods of time necessary to shift power balances. This is not to say the UAE does not punch above its weight given its small size. Rather, it proves that power is finite and that states — all states — are often hindered in achieving their intentions because of their capabilities. These realities call into question the validity of assertions that the UAE, with its nascent string of ports, should be considered a thalassocracy.

This article begins with a historical case study of the UAE's neighbour, the Sultanate of Oman, a historical quasi-thalassocracy. It then catalogues and analyses the UAE's current maritime strength and its so-called “string of ports” strategy before assessing whether the country is indeed a thalassocracy.

Oman as a Quasi-thalassocracy

The term thalassocracy applies somewhat to historical Oman because it has “the advantage of indicating that political rule [was] exercised over a network by means of maritime power and connection rather than

⁷ In line with this critique, see B J Cannon & F Donelli, “Asymmetric Alliances and High Polarity: Evaluating Regional Security Complexes in the Middle East and Horn of Africa”, *Third World Quarterly* 41, no. 3 (2020), pp. 505–524; see also, F. Donelli, F., & B J Cannon, “Power projection of Middle East States in the Horn of Africa: Linking Security Burdens with Capabilities”, *Small Wars & Insurgencies* (2021), pp. 1–21.

through the operations of a centralising state.”⁸ In order for Omani governors in Mombasa or Zanzibar — often African slaves in the service of Omani Arabs — to impose taxes and control trade, Muscat’s sultans relied on a dense network of Indian traders and Balochi mercenaries.⁹ Both groups were amenable to Oman’s light political touch and adhered to these arrangements because Omani money paid for their cooperation, or because they benefitted from the trading networks.¹⁰ Thus, mercenaries, combined with the vessels available to Omani and Indian merchants, allowed Omani rulers to approach something akin to a mercantile thalassocracy from 1792 to 1865. Often overlooked in this period, nonetheless, are the political decisions made in combination with other “ingredients” that allowed Oman’s rulers to become a maritime power in the first place.

“The political decisions made in combination with other ‘ingredients’ that allowed Oman’s rulers to become a maritime power in the first place were often overlooked.”

Muscat’s rise was, in large part, a result of the intense rivalry for maritime dominance in the Indian Ocean — and ultimately dominance of India — between France and Great Britain. France’s island possessions in Mauritius and Reunion triggered London’s quest for friendship with Muscat, forced or not. The result of this European

⁸ J Jones & N Ridout, *A History of Modern Oman* (Cambridge University Press, 2015), p. 35.

⁹ B Nicolini, *Makran, Oman, and Zanzibar: Three-Terminal Cultural Corridor in the Western Indian Ocean, 1799–1856* (Vol. 3), (Brill, 2004), p. 32.

¹⁰ B Nicolini, *Makran, Oman, and Zanzibar*, pp. 34, 36–40.

rivalry was the 1798 Treaty of Muscat,¹¹ which forced Oman to give up the port of Bandar Abbas, offered Oman the theoretical protection of Great Britain's powerful navy against France, and gave Omani rulers the opportunity to exploit existing networks to establish its short-lived status as a maritime power.

“While geography may form a great deal of a state's, or ruler's destiny, Oman's sultans made a choice to engage with and utilise the tools and agents at their disposal *at this particular juncture in time.*”

In addition, while geography may form a great deal of a state's, or ruler's destiny, Oman's sultans made a choice to engage with and utilise the tools and agents at their disposal *at this particular juncture in time.* They made their decision based on their limited ability to project maritime power and control of the sea (as compared to the power of their neighbours).¹² In other words, Oman's limited capabilities would not have given the sultanate the status of a quasi-thalassocracy. Rather, Oman's sultans opted to take a “position within the ‘globalising’ world-system by extending and enhancing [their] participation in the existing Indian Ocean networks”, to include British naval protection.¹³ It was Britain's naval supremacy in the Indian Ocean and Muscat's treaty with

¹¹ Also known as the Treaty of Commerce and Navigation. See S B Miles, *The Countries and Tribes of the Persian Gulf* (Vol. 2), (Harrison and Sons, 1919), p. 281.

¹² For more on the choice of states and rulers to become maritime powers, see D W Blagden, J S Levy, & W R Thompson, Sea Powers, Continental Powers, and Balancing Theory, *International Security*, 36, no. 2, (2011), pp. 190–202.

¹³ J Jones & N Ridout, *A History of Modern Oman*, p. 44.

London, as well as its foreign policy priorities that largely avoided provoking London, which saw Oman's maritime empire flourish.

The UAE's Naval Assets and "String of Ports"

The UAE currently has a small merchant marine.¹⁴ Its navy, on the other hand, counts 67 vessels as comprising its naval force.¹⁵ This substantial number, however, includes vessels under 30m, which many do not count when reporting their fleet size. Since the establishment of the Emirati naval forces in 1967, their priority has been and remains the protection of territorial waters, particularly the country's offshore oil and gas facilities. Hydrocarbons are the lifeblood of the UAE, and their protection comprises the core economic and security interests of the country. In terms of projecting force to its near abroad, the UAE navy began multi-country operations only in 2009. However, the UAE's contribution to these operations was limited because of sustainability at sea issues, demands for vessels for other missions, a shortage of vessels with required capabilities such as high-speed transports, and a dearth of ships with qualified crews. In the wake of the Yemen crisis in 2015, the UAE did send Baynunah-class corvettes to patrol the southern Red Sea and Gulf of Yemen, undertaking blockading and force protection operations in the process.¹⁶ However, the UAE navy had to hire

¹⁴ The UAE hosts a number of large ship owners, including branches of international owners. It does flag vessels, but most shipping is done by offshore companies, although they maintain offices in Dubai. See Ince and Co., LLP, "Shipping in The United Arab Emirates", *Lexology* (2019), <https://www.lexology.com/library/detail.aspx?g=22b7cf33-d11a-4b82-b21c-231abd6c3365>

¹⁵ International Institute for Strategic Studies (IISS), *IISS Military Balance 2020*, p. 382.

¹⁶ The UAE now has six 71m corvettes (Baynunah class). Unlike their roles in most navies, these are multi-mission corvettes designed to undertake a range of tasks including patrolling, minelaying and anti-surface warfare operations. Technically, they can operate

additional support vessels to assist it with moving equipment and personnel to Yemen and within the region because of the aforesaid shortcomings.¹⁷

“The Omani sultanate possessed no navy and limited merchant vessels, primarily dhows.”

Comparisons with the historical Omani mercantile empire are instructive here. The sultanate possessed no navy and limited merchant vessels, primarily dhows. Instead, as noted, it paid dearly for mercenaries and transported those mercenaries on Indian merchant vessels or local dhows.¹⁸ It also relied on the naval power of Great Britain to provide the secure space for trade networks — into which the sultanate tapped — to flourish between Oman, Zanzibar and the subcontinent.¹⁹ What Oman did end up with were ports and trade hubs such as Mombasa. These had developed for commercial reasons historically and only later became the focus of limited Omani political control, which ceased, except in theory, whenever Britain intervened.

both in shallow waters and blue water. However, significant extra weight has been added by the vessels’ multiple weapon systems, possibly compromising their performance. Athol Yates, *The Evolution of the UAE Armed Forces* (Solihull: Helion & Company, 2021), p. 267.

¹⁷ Athol Yates, *The Evolution of the UAE Armed Forces*, p. 269.

¹⁸ Oman’s rulers preferred expensive but loyal Baloch mercenaries to the “untrustworthiness of Arab troops and the potential risks they could have posed” to the regime. B Nicolini, *Makran, Oman, and Zanzibar*, p. 34.

¹⁹ British naval support for Omani interests in the western Indian Ocean was never guaranteed. See J Jones & N Ridout, *A History of Modern Oman*, p. 45.

What of the UAE's "string of ports" dotting the littoral of the Red Sea and Horn of Africa? Do these constitute evidence of a thalassocracy in the making akin to even the imperfect case of Oman, let alone a cultural and strategic thalassocracy like Venice? The similarities are limited because these ports do nothing to further the UAE's "political rule [as] exercised over a network by means of maritime power and connection."²⁰ The UAE is not tapping into existing trade networks to tax or control trade, thereby becoming politically powerful. Rather, Dubai's DP World is refurbishing and expanding ports to create trade, in the case of Berbera in Somaliland, or to expand it, in the case of Djibouti. DP World certainly earns money from a variety of revenue sources in doing so, but this is not used directly to further the political power of the UAE. Even if DP World's actions fitted into the political aims of the UAE's leadership, Abu Dhabi (as the most powerful emirate) does not possess the maritime assets to establish political control, nor does it have a treaty with a great power that — even theoretically — provides it with the force needed to "protect trade."

“The UAE’s ‘string of ports’ do nothing to further the UAE’s
‘political rule [as] exercised over a network by means of
maritime power and connection’.”

Some scholars have argued that commerce and security are interlinked in the UAE and therefore have concluded that DP World, while admittedly a commercial entity, is also one that acts on behalf or at the behest of Abu Dhabi's political rulers. DP World, however, is not a national entity; it is a Dubai-based company beholden to its board. While

²⁰ J. Jones & N. Ridout, *A History of Modern Oman*, p. 35.

it would do nothing to contradict the general contours of UAE foreign policy, its actions are driven — as befits a commercial entity — by profit.²¹ The cases of ports in Berbera and Djibouti are instructive.

“Even if DP World’s actions fitted into the political aims of the UAE’s leadership, Abu Dhabi (as the most powerful emirate) does not possess the maritime assets to establish political control, nor does it have a treaty with a great power that ... provides it with the force needed to ‘protect trade’.”

Berbera. The port, located in the de-facto independent but internationally unrecognised Republic of Somaliland, represents a low-risk, low-to-medium return on investment for DP World.²² Despite this, the connection made by some between ports deals, the UAE’s growing political power and its military adventurism is understandable. The tripartite deal signed by DP World, Somaliland and Ethiopia in May 2016 did coincide with the conflict in Yemen and the UAE’s deployment of troops there in mid-2015. Yemen also played a role in a subsequent February 2017 agreement between the UAE’s military and the government of Somaliland for the construction of a small military facility

²¹ Author’s interview with senior DP World official, Dubai, UAE, January 2020.

²² Should the port expansion proceed as outlined, it would allow for the export of mainly livestock from Somaliland and Ethiopia. Equally important, there is a huge demand to import cement, gypsum and edible oils into Ethiopia. The volume of traffic at Berbera port, as of early 2020, had already increased 60 per cent since 2017 (from 80,000 TEUs to 128,000 TEUs), and this even before the construction of roads, expansion of the port and implementation of a free zone have been completed. Author’s interview with senior DP World official, Dubai, UAE, January 2020.

and naval dock near the port of Berbera.²³ The two agreements were, nevertheless, separate.²⁴

“Berbera could not have been used for naval support of operations in Yemen or elsewhere — even if the UAE had greater naval capabilities.”

In addition, Berbera could not have been used for naval support of operations in Yemen or elsewhere — even if the UAE had greater naval capabilities. The port was moribund, only accepting small vessels as late as September 2018, when DP World embarked on the first of four planned phases to upgrade and expand the port.²⁵ Furthermore, the port lacked the facilities that would routinely be found in naval ports.²⁶ Finally, DP World’s interest in Berbera preceded Abu Dhabi’s decision to deploy its military to Yemen.²⁷

²³ As a further signal that the UAE’s strategic interests in its near abroad were predicated on the war in Yemen, the military facility planned near the airport has since been cancelled. Given the UAE’s decision to withdraw from Yemen in mid-2019, Abu Dhabi simply sees no need to build the facilities. See Jama Farah, “UAE cancelled the construction of military base in Berbera,” *Horn Diplomat*, 4 March 2020, <https://www.horndiplomat.com/2020/03/04/uae-cancelled-the-construction-of-military-base-in-berbera/>

²⁴ Author’s interview with senior DP World official, Dubai, UAE, January 2020.

²⁵ Author’s interview with DP World manager, Berbera, Somaliland, May 2018.

²⁶ These include a security perimeter, accommodation facilities, munitions bunkers and medical facilities.

²⁷ For background and details, see Brendon J Cannon and Ash Rossiter. “Ethiopia, Berbera Port and the Shifting Balance of Power in the Horn of Africa”, *Rising Powers Quarterly* 2, no. 4 (2017): 13.

Djibouti. In the case of Djibouti, DP World had significant concessionary agreements to run the country's largest container port at Doraleh prior to the Berbera deal. Allegations of mismanagement and corruption levelled by the Djiboutian government against the Dubai-based ports operator, however, culminated in the forcible removal of DP World in February 2018. The subsequent response of the UAE is both telling and worth noting. Although DP World and Abu Dhabi remain angered by the loss of Doraleh — fiscally estimated at over US\$1 billion — the company's forceful expulsion from Djibouti resulted in no action from the UAE to “protect its investments” other than DP World taking the government of Djibouti to court to press its claims. This, more than anything else, resembles Oman, its maritime trade empire, and the inability of its rulers to maintain their “thalassocracy” in the face of either British de-facto rule (1890–1963) or local actions (revolution and independence movement in Zanzibar, 1963–1964).

A New Thalassocracy?

The preceding sections began to answer whether we are witnessing the birth of a new thalassocracy. To conclude, a brief discussion of the actions of the UAE and those of its ports operators is appropriate. DP World, for instance, currently operates ports or portions of ports in Berbera, Sokhna in Egypt, and Jeddah. However, it withdrew from Aden in 2012. Its subsidiary, P&O Maritime, is reportedly operating and refurbishing the small port of Bosaso in the autonomous Puntland region of Somalia. Abu Dhabi Ports, arguably the ports operator of choice for the rulers of Abu Dhabi, currently has no operations in the

Red Sea or Horn of Africa.²⁸ While the UAE, with the assistance and acquiescence of local forces in Yemen, reportedly maintained brief control of other small ports such as Mukalla during its involvement in the Yemen conflict, these are hardly trade entrepôts akin to Oman's historical ports in Zanzibar and Mombasa.

“The UAE is far from resembling strategic thalassocracies à la Mahan and even farther from Lawson's politico-cultural thalassocracies.”

The UAE, while a strong ally of the United States, lacks a great power partner like Oman had in Great Britain. London, from time to time, was willing to enforce Oman's trading privilege — if they were congruent with Britain's interests. While the UAE began to recently tap into existing trade networks, this has occurred in a highly limited fashion, and it is only one of many countries to do so.

Possessing neither the ships nor naval capabilities to significantly shift distributions of power in its near abroad, the UAE is far from resembling a strategic thalassocracy à la Mahan. It is even farther from Lawson's politico-cultural thalassocracies, which purposely choose to foster a national maritime culture to balance against more

²⁸ AD Ports is the master developer and regulator of ports and industrial zones in emirate of Abu Dhabi. It has only one foreign operation, the Kamsar Container Terminal in Guinea, West Africa, which it operates on behalf of Emirates Global Aluminium, a global aluminium company jointly owned by Abu Dhabi and Dubai government investment companies.

powerful continental states. In sum, the UAE should not be classified as a thalassocracy. ◆

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East Mediterranean Gas Discoveries and their Strategic Impacts

Ehud Eiran*

While recent natural gas discoveries and developments in the eastern Mediterranean have ushered in a modest degree of economic cooperation among the littoral countries, they have also exacerbated the existing tensions between some of these players. The growing importance of these offshore gas fields has given added reason to a number of key regional actors to develop more elaborate maritime strategies to protect both their economic and security interests.

The discovery and development of natural gas fields in the eastern Mediterranean over the past two decades has fostered a modest degree of economic cooperation and interdependence among some of the littoral countries while also drawing greater international economic engagement in the region. By increasing Israel's energy independence, these discoveries and cooperative arrangements have

enhanced the country's position in the region. At the same time, the gas discoveries have created new sources of conflict, namely, between Israel and Lebanon and between Turkey and the Republic of Cyprus. These developments have encouraged some of the key regional actors to turn their attention to the sea and develop more elaborate maritime strategies.

Gas Discoveries

Beginning in the late 1990s, Israel, Egypt, Cyprus, and the Palestinian Authority discovered significant offshore gas deposits in two regional geological formations — the Nile Basin and the Levant Basin — located in waters off their shores in the eastern Mediterranean (see map). Egypt had already discovered an offshore natural gas field in the late 1960s and has been operating it since 1970.¹ However, the recent discoveries were far more significant by virtue of their sizes and the fact that some of them straddled the exclusive economic zones (EEZs) claimed by various states. They also created an incentive for other countries in the region to issue tenders for exploration and for international energy companies to bid for them.

The two most significant discoveries in the region were the Egyptian Zohr field, discovered in 2015 and believed to contain 30 trillion cubic feet (TCF) of recoverable gas,² and the Israeli Leviathan field, discovered in 2009 and believed to hold some 22 TCF

¹ Arab Republic of Egypt, Ministry of Petroleum and Mineral Resources, “Natural Gas”, n.d., <https://www.petroleum.gov.eg/en/gas-and-petrol/discovery-search-production/Pages/gas.aspx>

² Wood Mackenzie, “Asset Report: Zohr”, October 2021, <https://www.woodmac.com/reports/upstream-oil-and-gas-zohr-32315360>

(recoverable).³ In 2011, Cyprus discovered the Aphrodite gas field. This has a small extension that goes into Israeli waters (Yishai reservoir) and holds an estimated 10 per cent of the gas deposits. The field is still undeveloped. Gas also was discovered in 1999 in the sea near the Gaza Strip (Gaza Marin) but has not been developed to date.

The Israeli and Egyptian discoveries were brought online in the following years. Production from the Egyptian Zohr field began in 2017, only two years after its discovery.⁴ Israeli's Leviathan gas field, which was discovered in 2009, came online in late 2019. Israel's Tamar field, northeast of the Leviathan gas field, came online in 2013, four years after it was discovered. By 2020, natural gas from the Tamar and Leviathan fields accounted for 70 per cent of Israel's electricity production.⁵ The expected addition of gas from a third field, Karish-Tanin, in mid-2022⁶ will further increase Israel's reliance on natural gas.

The two geological formations, the Nile Basin and the Levant Basin, where the discoveries were made, are believed to hold yet more gas. As a result, Egypt, Cyprus, and Israel continue to issue tenders for exploration, and they have been joined by Lebanon and Syria.⁷

³ Leviathan, "The National Project", <https://leviathanproject.co.il/>

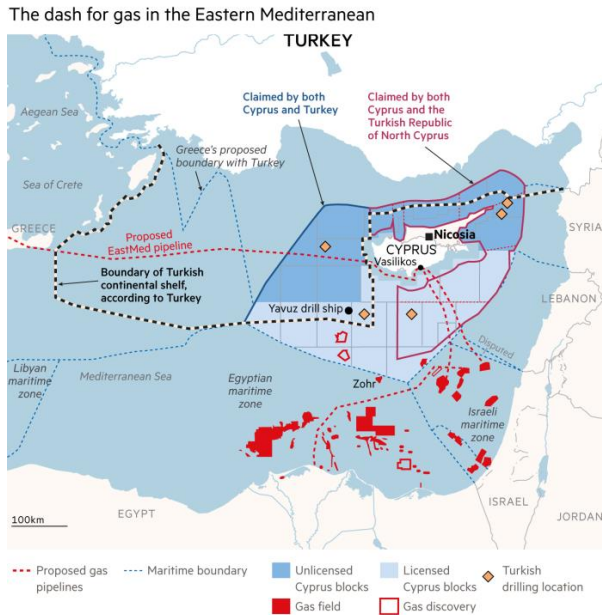
⁴ Offshore Energy Today, "Update: Zohr gas production to reach 3.2 bcf/d target by 2019 end", 21 August 2019, <https://www.offshore-energy.biz/report-zohr-gas-production-to-reach-3-bcf-d-target-by-2019-end/>

⁵ Israeli Ministry of Energy, "A Report on the Structure of the Energy Market in Israel", March 2021, https://www.gov.il/BlobFolder/reports/israel_energy_sector/he/israel_energy_sector.pdf

⁶ Energean, "Karish", 18 March 2022, <https://www.energean.com/operations/israel/karish/>

⁷ C. J. Schenk, M. A. Kirschbaum, R. R. Charpentier, T.R. Klett, M. E. Brownfield, J. K. Pitman, T. A. Cook, and M. E. Tennyson, M.E., 2010, "Assessment of Undiscovered Oil

EastMed Pipeline Project Map



Courtesy Artyom Sokolov, 22 July 2020. CCC BY-SA 4.0,
https://commons.wikimedia.org/wiki/File:EastMed_pipeline_project_map.png

and Gas Resources of the Levant Basin Province, Eastern Mediterranean”, US Geological Survey Fact Sheet, 2010; M. A. Kirschbaum, C. J. Schenk, R. R. Charpentier, T. R. Klett, M. E. Brownfield, J. K. Pitman, T. A. Cook, and M. E. Tennyson, “Assessment of Undiscovered Oil and Gas Resources of the Nile Delta Basin Province, Eastern Mediterranean, US Geological Survey Fact Sheet, 2010.

Foreign Interest in Energy Projects

Energy prospects in the Eastern Mediterranean have also created an opening for both international and regional investors. Most notably, the Greek-British energy company Energean owns the Israeli Karish-Tanin gas field, as well as 80 per cent of the licences in four other blocks in Israel's EEZ. Energean also owns 100 per cent of the oldest offshore gas field in the region, Egypt's Abu Qir, as well as other Egyptian fields, namely, North El Amriya, North Iduku, and North East Hap'y. The Israeli gas field Leviathan was almost 40 per cent owned by US-based Noble Energy, which was later acquired by Chevron in 2020.

Within the region, an Israeli company, Delek Drilling, owns 30 per cent of the Cypriot field Aphrodite. Mubadala, Abu Dhabi's sovereign wealth fund, owns gas fields in Israel and Egypt.

Growing Energy Interdependence

Historically, the Middle East has been known as an area with low levels of intra-regional trade and economic interdependence. However, the gas discoveries have changed this state of affairs to some degree. Much of this nascent regional energy interdependence involves offshore fields. At its heart is the Arab Gas Pipeline (AGP) project, the 1,200 km long pipeline that runs from Egypt, through Jordan to Lebanon, Syria, and Turkey. There are also pipes running from Egypt and Jordan to Israel, but, owing to political constraints, they are not formally considered to be part of the AGP. Portions of the pipeline were used over the years to deliver Egyptian gas to Israel and Jordan. As Egypt's energy demands

grew, the pipeline was used in the reverse, with gas flowing from Jordan⁸ and Israel to Egypt. Israel also exports gas to Jordan through a shorter pipeline that serves industrial potash activity in the Jordanian Dead Sea. (Israeli companies signed several preliminary agreements over the years to export gas to power stations both in the West Bank and Gaza, although none of them has materialised to date.⁹) This regional energy connectivity and burgeoning interdependence is expected to grow further, with the possibility of connecting the pipeline to Iraq.¹⁰

“At the heart of the nascent regional energy interdependence is the 1,200 km-long Arab Gas Pipeline project.”

In a separate development, Egypt signed an agreement to import gas from Israel, then process it into liquefied natural gas (LNG) at its facilities in Idku and Damietta and re-export it to markets in Asia and Europe. Media reports suggest that Egypt signed a similar agreement with Cyprus, although for now Nicosia still does not produce its own natural gas. The ongoing war in Ukraine may provide an incentive for deeper cooperation between Egypt and Europe in this regard. Indeed,

⁸ This was gas that Jordan imported from international markets in the form of LNG and re-exported to Egypt.

⁹ Times of Israel, “Qatar, PA advance deal to supply Gaza power plant with Israeli natural gas”, 27 December 2021, *Times of Israel*, <https://www.timesofisrael.com/qatar-pa-advance-deal-to-supply-gaza-power-plant-with-israeli-natural-gas/>

¹⁰ Adal Mirza, “Iraq eyes Syria transit route for Egyptian gas imports”, Argus Media, 19 April 2021, <https://www.argusmedia.com/en/news/2210305-iraq-eyes-syria-transit-route-for-egyptian-gas-imports>

Egyptian energy analyst Ahmed Kandil wrote in early March 2022 that “the Ukraine crisis might offer Egypt an opportunity to achieve its strategic aim of becoming a regional hub for the production, trade, and shipment of natural gas.”¹¹

All these interdependencies hold the promise for greater stability, both at the state level and the regional level. For example, with the energy crisis wreaking havoc on Lebanon’s internal stability, Egypt agreed to supply gas to Lebanon via Jordan. Reports suggest that the gas will be supplied to Egypt by Israel. If these are accurate, the Egyptian pass-through would provide the political cover for the government in Beirut against allegations that it receives gas from Israel.¹² Likewise, in February 2021, Qatar pledged US\$60 million to develop the infrastructure that would enable Gaza to receive gas from Israel.¹³ At the regional level, the Israeli-Egyptian and Israeli-Jordanian gas deals provide an economic layer to the peace treaties between Israel and the two Arab nations.

An Israeli-Greek-Cypriot Quasi-Alliance?

Another regional effect of the gas discoveries is their contribution to the evolution of an Israeli-Greek-Cypriot quasi-alliance starting in the first

¹¹ Ahmed Kandil, “Can Egypt become a gas supplier to Europe?” *Abram Online*, 8 March 2022, <https://english.abram.org.eg/NewsContent/50/1201/462514/AlAbram-Weekly/Egypt/Ukraine-LNG-wars.aspx>

¹² Sara Seif Eddin, “Why gas earmarked for Lebanon is not Egyptian”, *Mada Masr*, 22 February 2022, <https://www.madamasr.com/en/2022/02/23/feature/politics/why-gas-earmarked-for-lebanon-is-not-egyptian/>

¹³ Associated Press, “Qatar to pour \$60 million into new Israel-Gaza gas pipeline”, AP News, 21 February 2021, <https://apnews.com/article/israel-united-arab-emirates-middle-east-qatar-dubai-34dc00216a5e7587e57bddf0dc8f9049>

decade of the century.¹⁴ It was common concerns about Turkey that brought the three nations closer, and potential cooperation relating to gas provided a comfortable point of focus for their cooperation.

“Common concerns about Turkey brought Israel, Greece and Cyprus closer.”

Leaders of the three nations, as well as their senior officials, meet on a regular basis and support each other diplomatically. For example, Israel backed the Cypriot position regarding the Turkish incursion into the demilitarised zone on the island of Cyprus, near the city of Verosha, in the summer of 2021.¹⁵ The three nations also cooperate militarily. Israel sells arms to both Hellenic nations, and all three of them periodically engage in joint military exercises. In early 2018, Cyprus took delivery of an Israeli-made offshore patrol vessel and made clear that it was intended for protecting the island's EEZ.¹⁶ In January 2021 it was revealed that Greece had signed a 20-year contract with Israeli defence manufacturer Elbit Systems to upgrade the training capacity of its air force. Beyond the security dimension, the three

¹⁴ Zenonas Tziarras, “Israel-Cyprus-Greece: A ‘Comfortable’ Quasi-Alliance”, *Mediterranean Politics* 21, no. 3 (2016), pp. 407–427

¹⁵ Barak Ravid, “Scoop: After Erdoğan call, Israel reassures Greece”, *Axios*, 21 July 2021, <https://www.axios.com/erdogan-call-israel-greece-turkey-relations-17d4be64-5501-40d3-a739-79986f64fcf5.html>

¹⁶ Naval Today, “Cyprus Navy commissions its first ever offshore patrol vessel”, *Naval-today.com*, 15 January 2018, <https://www.navaltoday.com/2018/01/15/cyprus-navy-commissions-its-first-ever-offshore-patrol-vessel/>

countries have signed a large number of cooperation agreements on matters such as tourism, education, and innovation.

As noted earlier, energy companies from Israel have invested in energy assets in Cyprus while those from Greece have invested in energy assets in Israel. The most significant joint project that the three countries have been discussing is the EastMed pipeline. This is meant to connect the Israeli and Cypriot gas fields via a 1,900 km long undersea pipeline to Greece and from there to Italy and the rest of Europe. However, it is unclear whether the project will move ahead, in part because the United States has withdrawn its support for it.

“The East Mediterranean Gas Forum offers Israel a place within a regional construct that accepts it.”

The offshore energy agenda of this quasi-alliance was further advanced as it stood at the heart of the creation of a new regional institution, the East Mediterranean Gas Forum, formed by the three nations along with Egypt, Jordan, the Palestinian Authority and Italy. Born out of an Egyptian initiative, the forum was formally launched in 2021, although it had been in existence since 2019. France joined the forum after it was created, while the European Union, United States and the World Bank are observers. The vision of the forum is to create a “platform for structured policy dialogue on natural gas, leading to the development of a sustainable regional gas market that could unlock the full gas potential in the East Mediterranean region.”¹⁷ The forum holds the promise of optimising policies regarding gas, and, beyond that, serves

¹⁷ East Mediterranean Gas Forum, <https://emgf.org>

as an economic foundation for greater regional coordination. At a deeper level, the forum holds two identity-based promises. First, it offers Israel a place within a regional construct — a Mediterranean one — that accepts it. This against a background in which the state of Israel is not fully recognised by most of the Middle Eastern countries. Second, the forum puts paid to the notion that the Israeli-Hellenic quasi-alliance is a Judeo-Christian entity operating in opposition to the Muslim world, especially Turkey.^{18 19}

“The East Mediterranean Gas Forum puts paid to the notion that the Israeli-Hellenic quasi-alliance is a Judeo-Christian entity operating in opposition to the Muslim world, especially Turkey.”

However, the quasi-alliance is facing at least two challenges. One of these revolves around the uncertainty regarding the EastMed pipeline project, which was the primary large-scale joint project that the three

¹⁸ For Israeli concerns that the quasi alliance would be seen through this lens, see Orna Mizrahi, “Israel’s Policy in its Triangular Relations with Greece and Cyprus”, Policy Analysis 23, no. 3 (July 2020), Institute for National Security Studies (INSS), Tel Aviv University, <https://strategicassessment.inss.org.il/en/articles/israels-policy-in-its-triangular-relations-with-greece-and-cyprus/>; For a Turkish perspective on the religious undertones of the issue, see Joshua Krasna, “Israel-Greece-Cyprus take on Turkey in the Mediterranean”, *Al-Monitor*, 22 January 2020, <https://www.al-monitor.com/originals/2020/01/israel-turkey-greece-cyprus-benjamin-netanyahu-natural-gas.html>

¹⁹ A closer look would reveal that this presumed dichotomy between an Israeli-Hellenic quasi alliance and the Muslim world has its limitations. For example, Cyprus and Greece have had excellent relations with the Arab world throughout the Cold War.

nations were advancing. The project initially received US support as Washington, especially during the Trump presidency, saw the pipeline as a possible vehicle to decrease European reliance on Russian gas. Although the European Union funded a preliminary study on the pipeline, most experts warned that the project would face numerous technical, political, economic, and environmental challenges. Indeed, in January 2022, the United States withdrew its support from the project. But energy cooperation between Israel, Cyprus and Greece may still go ahead even if the East Med gas pipeline is not developed: in January 2022, the European Union granted €567 million for the development of the EuroAsia Interconnector, an electric subsea cable that will connect the national grids of Israel, Cyprus and Greece.²⁰

“A significant challenge to the quasi-alliance arises from Turkey’s efforts to improve relations with Israel and possibly create a wedge between the two Hellenic states and Israel.”

A more significant challenge to the quasi-alliance arises from Turkey’s efforts to improve relations with Israel and possibly create a wedge between the two Hellenic states and Israel. Turkey and Israel had a close informal alliance in the 1990s that included foreign and security coordination, especially vis-à-vis their joint neighbour, Syria. That informal alliance included significant arms deals, trade, and tourism.

²⁰ AFP, “Cyprus, Greece, Israel electricity link gets EU Funding”, *Barron’s*, 27 January 2022, <https://www.barrons.com/news/cyprus-greece-israel-electricity-link-gets-eu-funding-01643294108?tesla=y>

However, with the rise to power of Recep Tayyip Erdogan in Turkey, relations chilled. After 2004, Erdogan, then still prime minister, began to attack Israel. He called it a terrorist state, condemned it for its 2008 conflict with the Hamas movement in Gaza, and in 2009 stormed out of a public event with Israel's then president, Shimon Peres, during the World Economic Forum in Davos.

A major crisis occurred in May 2010, when Israeli forces killed 10 Turkish activists on board the *Mavi Marmara*, a ship that had tried to break Israel's maritime blockade of Gaza. The Turkish state prosecution subsequently indicted 10 senior Israeli officers, including the chief of staff, the director of military intelligence and the commander of the navy, over the incident.²¹ The issue was resolved in 2016 through US mediation, following which Israel paid compensation to the Turks and Turkey dropped the charges against the Israeli officers. Nevertheless, the relationship remained cold for a few years, not least because Turkey has been assisting Hamas by allowing it to operate within Turkish territory, awarding citizenship to senior Hamas operatives,²² funnelling funds to the organisation,²³ overlooking offensive Hamas cyber operations

²¹ Herb Keinon, "Turkish court to indict Ashkenazi over 'Marmara'", *Jerusalem Post*, 29 May 2012,

<https://www.ipost.com/international/turkish-court-to-indict-ashkenazi-over-marmara>

²² James Rothwell, "Turkey grants citizenship to Hamas operatives plotting terror attacks", *Telegraph*, 13 August 2020,

<https://www.telegraph.co.uk/news/2020/08/13/turkey-grants-citizenship-hamas-operatives-plotting-terror-attacks/>

²³ Ami Rojkes Dombe, "Turkish government agency providing funds to Hamas", *Israel Defense*, February 2021, <https://www.israeldefense.co.il/en/node/48273>

launched from its territory²⁴ and funding Palestinian projects in Israeli-controlled East Jerusalem.²⁵

Since early 2021, however, Turkey has signalled interest in better relations with Israel, including through public gestures towards Israel's president²⁶ and foreign minister.²⁷ These efforts led to high-level communications between the leaderships of the two countries: President Erdogan and Israeli Prime Minister Naftali Bennett spoke in November 2021. These efforts culminated in the March 2022 visit of Israel's president to Turkey, during which he and Erdogan committed themselves to advancing the bilateral relationship. Amid the thaw in the relationship with Turkey, Israel took steps to reassure Cyprus and Greece that its commitment to the quasi-alliance was unchanged.

Regional Effects: Conflicts

Alongside the aforesaid stabilising aspect, the evolution of regional gas production has also created arenas for confrontation within existing rivalries, most notably, between Israel and Lebanon, and between Cyprus and Turkey. Lebanon rejected the maritime boundary that Israel declared and is claiming a few hundred square kilometres of Israel's EEZ. Both

²⁴ Anshel Pfeffer, " Hamas uses secret cyberwar base in Turkey to target enemies", *The Times*, 22 October 2020, <https://www.thetimes.co.uk/article/hamas-running-secret-cyberwar-hq-in-turkey-29mz50sxs>

²⁵ Ahmad Melhem, "Israel goes after Turkish projects in Jerusalem", *Al Monitor*, 30 June 2020, <https://www.al-monitor.com/originals/2020/06/israel-destroys-turkey-plaque-jerusalem-activities-relations.html>

²⁶ The Israeli president is the head of the state, but the position is largely a ceremonial one.

²⁷ Lahav Harkov, "Israeli, Turkish foreign ministers talk for first time in 13 years", *Jerusalem Post*, 22 January 2022, <https://www.jpost.com/international/article-694148>

parties have been holding talks through US mediation since at least 2011, but no agreement has been reached up to now. Indeed, during the negotiations, Lebanon expanded its claim to include portions of the Israeli Karish-Tanin gas field. The conflict serves the interests of Hizballah, the armed organisation that has dominated Lebanese politics. Part of the organisation's identity and sources of legitimacy lies in its opposition to Israel that was solidified during Israel's occupation of the southern part of Lebanon between the years 1985-2000. However, once Israel withdrew from Lebanon in 2000, Hizballah has had to identify new sources for claims against Israel.²⁸ The maritime claims have created a new point of contention. For example, in October 2021, Hizballah's secretary general, Sayyed Hassan Nasrallah, warned Israel that if it moved ahead with exploration in the contested areas his organisation "will act".²⁹

A second conflict that has intensified around the gas discoveries is between Turkey and the Republic of Cyprus. In a number of instances Turkish naval vessels removed exploration ships that were opening in Cypriot waters.³⁰ Ankara is concerned that a successful development of

²⁸ Ehud Eiran, "Between Land and Sea: Spaces and Conflict Intensity", *Territory, Politics, Governance* 5, no. 2, 2017: 190–206.

²⁹ Times of Israel, "Nasrallah warns Israel against searching for gas in disputed maritime region", *Times of Israel*, 23 October 2021, <https://www.timesofisrael.com/nasrallah-warns-israel-against-searching-for-gas-in-disputed-maritime-region/>

³⁰ Michele Kambas, "Standoff in high seas as Cyprus says Turkey blocks gas drill ship", Reuters, 11 February 2018, <https://www.reuters.com/article/us-cyprus-natgas-turkey-ship-idUSKBN1FV0X5>; Al Jazeera, "Turkish navy orders Israeli ship out of Cyprus's waters", *Al Jazeera*, 19 December 2019, <https://www.aljazeera.com/economy/2019/12/15/turkish-navy-orders-israeli-ship-out-of-cyprus-waters>

Cypriot gas fields will isolate the Turkish-controlled part of the island of Cyprus.

A Regional Turn to the Sea: Navies, Maritime Visions and the Blue Economy

The recent offshore gas discoveries in the East Mediterranean have prompted countries in the region to pay greater attention to the maritime domain, mostly in terms of security and economics. For example, Israel has been described as experiencing a “turn to the sea” in the last two decades.³¹ Added to the country’s dependence on its seaborne energy resources is its dependence on desalinated water from the Mediterranean Sea. Between 2005 and 2015 Israel constructed five desalination facilities on the shores of the Mediterranean. These account for some 80 per cent of drinking water supplies in Israel. The turn to the sea has manifested itself, among other things, in the expansion of the Israeli navy to defend the country’s new offshore gas assets. Naval expansion is also intended to develop a submarine-based second-strike nuclear capability against a future nuclear Iran although Israel has never publicly stated so. Apart from the security component, the new turn to the sea involves two national maritime-related economic development plans, one initiated by Technion, a leading local university, and the other by the government’s planning directorate. Separately, in 2017 an Israeli-Chinese fund focused on the “blue economy” raised US\$150 million, promising to invest it in Israeli technology companies that work on “wind, wave, and solar energy; marine food, green and blue algae-based materials; drugs and cosmetics; artificial islands; sewage management; water purification and

³¹ Yael Teff-Seker, Ehud Eiran, and Aviad Rubin, “Israel turns to the sea”, *Middle East Journal* 72, no. 4 (2018): 610–630

desalination”.³² More recently, in early 2022, the city of Haifa created a national centre for innovation and a blue economy.³³

The second regional actor that has given new attention to the sea is Turkey. Ankara is advancing the concept of the “Blue Homeland” (Mavi Vatan). The idea was developed by Admiral Cem Gurdeniz, a leading figure in the Turkish navy, and has been adopted by President Erdogan. At the heart of the concept is the significance of the maritime domain in Turkey’s strategic outlook. Perhaps the most notable manifestation of this significance was the 2019 agreement between Turkey and the Libyan Government of National Accord, which created a maritime boundary between the two nations in disregard of any Greek claims in the region. Ankara is also engaged in a significant expansion of its navy, which includes the acquisition of a light aircraft carrier that is to be commissioned in 2022.

Conclusion

The significant gas discoveries in the eastern Mediterranean starting early this century have had major economic, political, and security effects in the region. Indeed, much of the policy and scholarly literature that points to the area as a distinct sub-region was written following these discoveries.³⁴ The discoveries and explorations have led to a modest

³² Tali Tsipon, “Israel-China Blueconomy fund raises \$150m”, *Globes*, 30 January 2017, <https://en.globes.co.il/en/article-blueconomy-investment-fund-raises-150m-1001174367>

³³ CTECH, “National Center for Innovation and Blue Economy to be established in Haifa”, *CTECH Calcalist*, 20 January 2022, <https://www.calcalistech.com/ctech/articles/0,7340,L-3927590,00.html>

³⁴ Efraim Inbar, “The New Strategic Equation in the Eastern Mediterranean”, Begin-Sadat Center for Strategic Studies, 2014; Spyridon n. Litsas and Aristotle Tziampiris (Eds.), *The Eastern Mediterranean in Transition: Multipolarity, Politics and Power* (Ashgate,

degree of energy interdependence, including the creation of a new regional organisation, the East Mediterranean Gas Forum. It has strengthened Israel strategically as it has become energy independent.

“Indeed, much of the policy and scholarly literature that points to the area as a distinct sub-region was written following these [gas] discoveries.”

The gas discoveries have facilitated the development of an Israeli-Greek-Cypriot quasi-alliance, which is, in effect, intended also to contain Turkey. Ankara, for its part, has been devising its own Mediterranean strategy, which focuses on territorial claims in the sea. The discoveries have drawn both extraregional state and private sector interests into the region.

The discoveries, in sum, have brought about greater economic cooperation and interdependence but also the intensification of some existing regional tensions, including that between a more assertive Turkey and some of the other regional players and a new maritime conflict between Israel and Lebanon. Either way, the new discoveries, as well as the new conflicts and tensions, have encouraged some of the key

2015); Eran Lerman, “Israel’s Emerging Relations in the Eastern Mediterranean” *Begin Sadat Center Perspectives* 321, 2015; Thanos Dokos (Ed.), “The Eastern Mediterranean in 2020: Possible Scenarios and Policy Recommendations”, ELLAMEP–Konrad Adenauer Stiftung Policy Paper, April 2016; Aviad Rubin and Ehud Eiran, “Regional Maritime Security in the Eastern Mediterranean: Expectations and Reality”, *International Affairs* 95, no. 5 (2019): pp. 979–997; Zenonas Tziarras (ed.), “The New Geopolitics of the Eastern Mediterranean: Trilateral Partnerships and Regional Security”, *Re-imagining the Eastern Mediterranean Series: PCC Report* 3, PRIO Cyprus Centre, Nicosia, 2019.

regional actors to turn their attention to the sea and led them to develop more elaborate maritime strategies, mostly in the security and economic fields. ♦

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A Danish-flagged container ship crossing the Suez Canal, 5 October 2012. AFP.

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