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MANISA CELAL BAYAR UNIVERSITY
INSTITUTE OF SOCIAL SCIENCES

MASTER THESIS
DEPARTMENT OF POLITICAL SCIENCE AND INTERNATIONAL
RELATIONS
POLITICAL SCIENCE AND INTERNATIONAL RELATIONS PROGRAM



AN ANALYSIS OF THE ENERGY RESOURCES IN THE EASTERN
MEDITERRANEAN AS A GAME CHANGER IN THE REGION

Öykün Berk SEVER

Supervisor
Assoc. Prof. Dr. Ülviye AYDIN

MANISA-2023

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APPROVAL



YEMİN METNİ

Yüksek Lisans tezi olarak sunduğum “An Analysis of the Energy Resources in the Eastern Mediterranean as a Game Changer in the Region” adlı çalışmamın, tarafımdan bilimsel ahlak ve geleneklere aykırı düşecek bir yardıma başvurmaksızın yazıldığını ve yararlandığım eserlerin kaynakçada gösterilen eserlerden oluştuğunu, bunlara atıf yapılarak yararlanmış olduğumu belirtir ve bunu onurumla doğrularım.

Öykün Berk SEVER

17.04.2023



DECLARATION

I hereby declare that this master thesis titled “An Analysis of the Energy Resources in the Eastern Mediterranean as a Game Changer in the Region” has been written by myself in accordance with ethical conduct and academic rules. All materials which are used in this thesis consist of the mentioned resources in the reference list. I verify this with my honor.

Öykün Berk SEVER

17.04.2023



ÖZET

BÖLGEDE OYUN DEĞİŞTİRİCİ BİR ETKEN OLARAK DOĞU AKDENİZ'DEKİ ENERJİ KAYNAKLARININ ANALİZİ

Dünya ülkeleri küreselleşme süreci ile yeni bir tecrübe deneyimlemektedir. Artan ticaret hacmi ve nüfus sayısına oranla azalan doğal kaynaklar fosil enerji kaynaklarının önemini arttırmaktadır. Ekonomik ve günlük yaşantının en önemli girdilerinden biri olarak fosil enerji kaynaklarının dünya üzerindeki eşit olmayan dağılımı, onun jeostatejik boyutunu derinleştirmektedir. Bu bağlamda Doğu Akdeniz'de ve özellikle Kıbrıs adası çevresinde petrol ve doğal gaz kaynak keşifleri, Akdeniz'e komşu ülkelerin enerji arz güvenliğini yakından ilgilendirmektedir. Bu çalışmanın amacı, zaten çok değişkenli bir denkleme benzetilebilecek Doğu Akdeniz bölgesinde yeni keşfedilen enerji rezervlerinin önemi ele alınmıştır. Çalışmada, birçok problem, kriz ve iş birliği fırsatlarını bir arada bulunduran Doğu Akdeniz'deki enerji kaynaklarının bölgede oyun değiştirici bir etken olarak rolü üzerine odaklanılmıştır.

Anahtar kelimeler: Doğu Akdeniz, Türkiye, enerji, enerji güvenliği, doğal gaz, petrol, boru hatları.

ABSTRACT

AN ANALYSIS OF THE ENERGY RESOURCES IN THE EASTERN MEDITERRANEAN AS A GAME CHANGER IN THE REGION

The world countries experience a new practice with the globalization process. Growing trade volume and the number of population and decreasing natural resources increase the importance of fossil energy resources. The unequal distribution of fossil energy resources, as one of the most important inputs of economic and daily life, deepens its geostrategic dimension. In this context, oil, and natural gas reserve discoveries in the Eastern Mediterranean and especially around the island of Cyprus are closely related to the energy supply security of the countries neighboring the Mediterranean. The aim of this study is to discuss the importance of newly discovered energy reserves in the Eastern Mediterranean region, which can already be likened to a multivariate equation. The study focuses on the role of energy resources in the Eastern Mediterranean as a game-changing factor in the region, which contains many problems, crises, and cooperation opportunities.

Key words: Eastern Mediterranean, Turkiye, energy, energy security, natural gas, oil, pipelines.

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ABBREVIATIONS

AKP	Justice and Development Party
B/CD	Barrels Per Calendar Day
B/D	Barrels Per Day
BCF	Billion Cubic Feet
BCM	Billion Cubic Meters
BTC	Baku-Tbilisi-Ceyhan
CU.M.	Cubic Meters
EEZ	Exclusive Economic Zone
EMGF	Eastern Mediterranean Gas Forum
EU	European Union
GDP	Gross Domestic Product
GNA	Government of National Accord (Libya)
GW	Gigawatts
IEA	International Energy Agency
IRENA	International Renewable Energy Agency
ISIS	Islamic State of Iraq and Syria
LCP	Leviathan-Ceyhan Pipeline
LNG	Liquid Natural Gas
MCF	Million Cubic Feet
MEEM	Middle East and the Eastern Mediterranean
NATO	The North Atlantic Treaty Organization
OPEC	Organization of Petroleum Exporting Countries
TCF	Trillion Cubic Feet
TGCASC	The Greek Cypriot Administration of Southern Cyprus
TRNC	Turkish Republic of Northern Cyprus
TTF	Title Transfer Facility
UK	United Kingdom
UN	United Nations
UNCLOS	UN Convention of the Law of the Sea
USA	United States of America
USD	USA Dollar
USSR	Union of Soviet Socialist Republics

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INTRODUCTION

Industrial Revolution has increased the need for fossil energy resources. Mass production and expanding new markets has triggered each other, which has led to a rise in demand for oil and natural gas. Discovery of steam engine has commenced Industrial Revolution by switching hand production to mechanized industry. All these developments have affected other economic fields also. The lack of such energy resources limits the use of machinery and transportation, so the demand for energy resources has always been high. The first known hydrocarbon energy resource is coal. However, at the end of the XIX century, the discovery of petroleum has become revolutionary and has played a crucial role as a pioneer. Technological developments have led to the discovery of petroleum, and the discovery of petroleum in turn has promoted technological progress. In short, an interdependence between technological development and the demand for energy resources has always existed, then as now. Thus, the energy resources have always accepted as “a game changer factor” in economic, political, and daily life of the countries.

Since the end of the World War II, conflicts that cause mass human deaths do not occur on global level. On the other hand, advances in science and technology make possible to extend the life expectancy of world population. In this context, a growing population naturally requires more energy. After the end of the World War II, rapid global economic development also required more energy, resulting in environmental pollution. Countries such as Germany, France, the Netherlands and the UK in Europe, China, Japan, South Korea, India and Russia in Asia, and the USA are major users of hydrocarbon energy resources, producing carbon emissions by burning fossil energy resources to generate electricity. This process pollutes the environment; however, the hydrocarbon energy resources such as coal, oil and natural gas are main inputs of the economic development of a state or region.

Energy reserves are not distributed evenly in the world. Therefore, there is an imbalance between energy demand and energy supply. Energy reserves are mainly located in the Middle East, Siberia, the Caspian Sea, and the Eastern Mediterranean. Due to this increase in energy demand, energy reserves have a geostrategic importance. As a result, states have had to accept the issue of meeting their energy needs as a security issue.

In the past decades, security meant only security or protection of one's borders or territorial integrity. However, in contemporary world, energy security is a serious

issue that determines the foreign policy of states. On the other hand, serious threats to the environment have prompted states to use renewable energy to reduce both pollution and dependence on foreign energy supplies.

The discovery of hydrocarbon energy resources in the Eastern Mediterranean appears to be changing the dynamics of energy supply and demand worldwide, adding a new geostrategic dimension that will have a significant impact on world energy trade, with several factors at play. First, the Eastern Mediterranean can be considered as a closed basin connecting the Middle East, North Africa, and Europe. Second, there are different cultures, religions, races, and languages in the same region. Third, long before the discovery of hydrocarbon energy reserves in the Eastern Mediterranean, there were historical, military, political, religious, and cultural challenges between the littoral states. Recent fossil fuel discoveries in the region appear to be influencing dynamics in the Eastern Mediterranean. Although a 100 per cent accurate determination is impossible, it is certain that energy dynamics will change worldwide. All the countries bordering the Eastern Mediterranean are in dire need of these energy resources. Utilization of these reserves for domestic needs or for export to demanding states can boost both the economies and technological progress of the countries. In particular, the potential energy revenues from natural gas exports would boost the economies of littoral states enough to reduce their foreign dependence. However, all the challenges mentioned in this section show that it is difficult to realize such projects.

Since the beginning of the XXI century, natural gas prices have increased by about 400 per cent. With the advancement of technology and the urgent energy needs of industrialization, existing underground energy reserves have proved insufficient. This has eventually led to set sail in search of energy reserves in the open seas. The Eastern Mediterranean has geostrategic and geopolitical value, so the search for energy reserves off the coast of TGCASC and Israel has led to major discoveries. In particular, gas deposits in the Aphrodite area of TGCASC and in the Leviathan and the Tamar areas of Israel have great economic, political and security importance.

The discovered energy reserves in the Eastern Mediterranean attract the attention of regional and global actors. In this context, the equal shares in the discovered energy areas and the maritime jurisdiction of the countries reveal divergences. As a matter of course, each state in the world acts in its own interests. Forming alliances in order to balance the power helps the states maximize their stakes and allows them to eliminate competition.

The objective of this thesis is to conduct an analysis of energy resources in the Eastern Mediterranean, which are considered as “a game changer” in the region. Chapter I of it explains the objective of the study, the methodology, the contribution to the literature and the delimitation of the study. The theoretical framework of the study has been set forth in Chapter II that includes international security studies under two titles such as traditional security studies and non-traditional security studies. Historical background, supply and demand security, and transformation of energy security attitudes are described under the title of energy security and geopolitics of pipelines. In Chapter III, energy reserves in the Eastern Mediterranean are explained in detail. In the last chapter of this thesis - Chapter IV, the actors in the region and their perspectives, claims and legal entitlements are discussed. This study is concluded with a conclusion part.

CHAPTER I

SCOPE AND IMPORTANCE OF THE STUDY

In this chapter, aim of the study, methodology, contribution to the literature and delimitations have been explained.

1.1. Aim of the Study

The discovered energy reserves in the Eastern Mediterranean are considered groundbreaking, especially for the value and importance of the region. Advancing technology and industry in the region have required enormous amounts of energy, so the discoveries have helped the region boom in the years that followed. Until then, there has been no energy trade in the area, but now the littoral countries have the opportunity to supply themselves with energy in the long term and generate new revenues by selling it to other countries (Darbouche et al., 2012: 3). The discoveries in the Eastern Mediterranean have created different opportunities and at the same time brought new challenges. These energy reserves have proved to be significant for the littoral states in terms of economic recovery through the sale of hydrocarbon resources and the generation of energy revenues, as well as their domestic use for technological development. This study aims to reflect the perspectives of all stakeholders regarding legal maritime rights, EEZ claims, political disputes, and military challenges.

Since the last decade, the Eastern Mediterranean has proven to be a gold mine for any gas explorer due to the enormous, low-cost gas discoveries. Energy discoveries in the Eastern Mediterranean are referred to as blue gold, which has led to a series of heightened geopolitical tensions between littoral states since the initial discovery.

It is still questionable whether the discovered energy reserves will meet the expected energy demand in the world. In this sense, the countries in the Eastern Mediterranean have different possibilities than others to meet their energy needs, as the geographical location of some is better than others.

For the economic development of the littoral states in the region, the offshore discoveries in the last decade have created a potential for the internal use of natural gas, making the region independent of fossil fuel imports. In particular, the energy discoveries of Israel and TGCASC have had a massive impact on their economies in terms of gas exports and domestic use. However, the TRNC is determined to oppose gas trading in its territorial waters (Gale, 2022), as TGCASC violates the sovereign

rights of both Türkiye and the northern part of the island to keep all the profits on the Greek Cypriot side. The urgent need for energy in the region has prompted both the Turkish and Greek sides to act quickly to eliminate competition from other parties.

It is an alternative for Russian gas and expected to shift transportation routes from north to south, highlighting the importance of discovering energy resources in the Eastern Mediterranean. Throughout history, the Eastern Mediterranean has always attracted a lot of attention due to its fertile arable land, rich lands and routes connecting the Mediterranean Sea with Europe. In the XXI century, the pre-existing importance of the region has simply increased and attracted the attention of global actors, leading to the outbreak of one conflict after another. Diplomatic tensions between Türkiye-TRNC and Greece-TGCASC became even greater than before. The Greek Cypriots demand that Cyprus be represented as a whole, while the Turkish Cypriots demand that the TRNC be recognized as an independent state, apart from the TGCASC. Only Türkiye recognizes the TRNC as an independent state and therefore signs energy agreements with it. Signing energy agreements with the TRNC for any other state also means recognition by other states of an independent Turkish Cypriot state in the northern part of Cyprus. Such an event would lead to serious political challenges in the region.

The discovery of natural gas reserves in the Eastern Mediterranean has shifted the balances in the region, dramatically increasing the importance of Cyprus. The unilateral agreements signed by TGCASC and Greece on an exclusive economic zone and the licenses they granted to global oil companies posed a massive threat to Turkish interests. Meanwhile, Greece is trying to use Türkiye's absence from the 1958 Geneva Convention on the Continental Shelf and the 1982 UNCLOS for Greek interests.

In order to achieve collective security in the region, full cooperation among the actors must be achieved, which is why more states recognize the TRNC as an independent nation and not as part of a united Cyprus. As can be seen, companies and states in the region tend to bypass the TRNC in order not to legally recognize it as a state, and this leads to serious setbacks in the energy plan. The elimination of the Russian energy monopoly can only be achieved if all strategic locations in the region are included in the game. The TRNC and Türkiye play an important role in achieving this cooperation.

Since the early 2000s, the crisis in Europe has gone from bad to worse, and eventually the EU had to overlook Russia's unjust occupation and simply agree to

Russian demands in order to improve relations. Something similar is happening now with the unjust Russian occupation of Ukraine, but this time the EU and NATO are fighting back and refusing to accept the Russian demands because there is now an alternative they are working on. However, all the data collected indicates that there are some regional issues and desperate attempts to exclude the TRNC and Türkiye from the picture, but Türkiye is a major player in the region, so its inclusion is essential to maintain energy security. One of the major issues that stalled the whole process of energy transportation through the Eastern Mediterranean was the de facto status of the TRNC. The only country that recognizes the Turkish Republic as an independent state is Türkiye, and Greece and TGCASC want everything to stay the same. They want complete control of Cyprus, and it is unlikely that Türkiye will simply agree to everything they put on the table and leave Cyprus to the Greek Cypriots for good. This is to show that neither party will benefit from all these rich resources unless the conflict is resolved by recognizing the TRNC first by TGCASC, then by Greece, and then by the rest of the world. It is very likely that there will be little to no demand for Russian energy in the near future until the issues are resolved peacefully. It is not clear yet, but the world will witness whatever the outcome will be in the future, and this work intends to be a basic resource for the subject by explaining the challenges mentioned under this title.

This study analyzes the importance of the region's natural gas wealth and its economic significance for the littoral states. The Eastern Mediterranean is of critical importance to each littoral state and therefore needs to be explored on many levels, such as economic, geopolitical, and legal aspects. A comprehensive study of the role of the littoral states in this issue will be an important contribution to the literature. All the data collected aim to reflect the positions of the littoral states and the shift of the energy corridor from Russia to the south due to the unjust Russian invasion of Ukraine, and how the discovery of hydrocarbon energy resources in the Eastern Mediterranean is changing the global energy dynamics.

The goal of this thesis is to analyze the newly discovered energy resources in the Eastern Mediterranean and how they will change the dynamics in the region. This will be comprehensively explained in the following chapters using parameters and data.

1.2. Methodology

In order to understand the impressive role of fossil energy resources in international, regional, and global politics, the Eastern Mediterranean region has been chosen as a case study in this thesis. As it is known, the purpose of a case study is to describe and try to understand and explain a particular object, situation, condition, area, or problem (George and Bennett, 2004: 6-10). Data from various sources are needed to conduct case study research. As is well known, literature review is a widely used technique for data collection in academic studies. Literature review is the most important part of a study. It is a process of drawing the path of a research topic (Baglione, 2020: 95-96). For this thesis, a qualitative research technique was preferred in the field of political science and international relations.

This thesis analyzes the situation in the framework of energy security and cooperation between littoral states, rivalries, challenges, and conflicts in terms of legal maritime responsibilities, and how the energy reserves discovered in the Eastern Mediterranean have changed the world dynamics in terms of energy import and export to another geographical location within and outside the framework of international law. An extensive literature review has been conducted for data collection, including official charts, tables, graphs, academic studies, news, articles, expert opinions, reports, statements, announcements, and books.

Studying and researching about each and every state that has a coastline to the Eastern Mediterranean and presenting their views in terms of their own respectful maritime jurisdiction is a good way to prove how the discovered energy reserves in the region affect all littoral states and the world. This is precisely why this case study is best suited for such studies, as it must focus on a specific location and circumstances.

1.3. Contribution to the Literature

Writing this master's thesis is an important contribution to Turkish literature, using different documentations in English. The aim of this study is to make an unorthodox contribution to the literature by analyzing the discovered energy resources in the Eastern Mediterranean and the role of the Mediterranean littoral states by using a comparative framework to define the regional challenges, conflicts, and cooperation between or among all factions around Zero Point or overseas. Since this is a new topic, it is difficult to estimate possible outcomes. What is certain, however, is that the world will be transformed by the impact of these discovered energy reserves on the energy

market. Even though, due to the lack of information on the subject, it is not possible to make 100 per cent accurate statements about the totality of the discoveries, the exploitation of the energy reserves, the logistics, the transportation and the use of the pipelines, this work will shed light on further studies as a fundamental source. This is the contribution of this work to the literature.

It is analyzed that the number of natural resources located in their legal territory and the rights of disputed territories to show whether their claims are just or not by using parameters on the continental shelf and claims of littoral states. Consideration of the viewpoints of each stakeholder is critical. It is intended to present the policies and viewpoints of all littoral states mentioned in this paper.

As developments on this topic are ongoing, this study offers important predictions of potential interventions and outcomes in the literature.

1.4. Delimitation of the Study

Academic studies are discussed from different points of view. In this regard, academic studies in the social sciences are a broad field within political science and the discipline of international relations. In this context, the geopolitical and geostrategic importance of the region, the large number of actors, and the fact that the subject is still too young, complicate the work, as it is still in development and lacks sources. In order to make this work more efficient and productive, delimitations had to be made in this study.

Since the subject of this study is very broad, it is impossible to cover all aspects of energy, energy security, Eastern Mediterranean relations, and history in a single study such as this one. The vast area of this topic limits me in this study. The boundaries of this work are limited to the littoral states of the Eastern Mediterranean and their conflicts and cooperation with each other regarding energy resources and how the discovered reserves will change the world.

CHAPTER II

THEORETICAL FRAMEWORK

A theoretical framework is a basic overview of theories that guides the construction of arguments and their direction or is used in studies, as intended in this thesis. Scientists and researchers need theories to describe or explain phenomena, that is, to connect dots, uncover the unknown, and make predictions. A theoretical framework uses preexisting theories to support a claim by showing that it is supported by reasoned and established ideas. This chapter explains the theoretical framework of this study by defining international security issues, energy security, and the geopolitics of pipelines.

2.1. International Security Studies

The concept of international security studies is one of the subtopics of international relations. It has emerged together with international relations after the World War II. The main theme of international security studies is to find an answer to the question of how to counter domestic and foreign threats, as this question has become increasingly common since the Cold War. Before the 1980s, they have been called security studies or strategic studies. Over time, such studies have become more hypothetical and systematic, so they were renamed international security studies and used in various fields.

The basic arguments of international security studies are examined through four questions:

- Is the state the only reference point for security?
- Should non-state actors be included in security studies?
- Do threats come from within the country or from outside?
- Can the concept of security be expanded beyond the military or the use of force? (Buzan and Hansen, 2009: 11-12).

The whole concept of international security studies revolves around the above questions and seeks answers to counter threats *ad rem* (Buzan and Hansen, 2009: 12). The main purpose of security studies is to justify security instead of conflict and clashes. The focus of international security studies is on the importance of social cohesion, military and non-military threats, and fragilities in society. In short,

international security studies analyze a range of policy matters more comprehensively than their predecessors.

According to traditional principles of international relations, the state is at the center of the concept of security, so threats can only come from outside, which means that they can only be military threats. Non-state actors are not recognized as potential threats by traditionalists. In the view of international relations theorists such as Milner and Wendt, the world is in an anarchic order (Milner 1991: 69; Wendt 1992: 419). However, the concept of anarchy does not mean that the world is in chaos or disorder, but rather that an international system is in order, in which there is no supreme authority over a nation that enforces law or superiority over others (Milner 1991: 69-70). Anarchy is only within the capabilities of each nation (Wendt, 1992: 419). Since the world is in anarchy, each state is on its own, and to survive, it follows only its own principles and interests. This results in an understanding in which the mere existence of states is a threat to each other. The case of the Cold War could be a good example to confirm the result of such studies. The dissolution of the USSR in 1991 also ended an era for international security studies that extended to non-state actors.

With the onset of the Cold War after the end of the World War II, states around the world have joined either NATO on the side of the USA or the Warsaw Pact on the side of the USSR, or they have joined neither, defined as Third World countries. Thus, realists have defined this era with a state-centric, military-based anarchic system (Morgenthau, 1970: 272). During the Cold War, the concept of security has changed and become a comprehensive issue with various subthemes. Initially, international security research has focused only on military analysis, but it has expanded to include issues of society, environment, culture, economy, and energy resources (Buzan and Weaver, 1998: 30), so the concept of security has been linked to the concepts mentioned in this study, resulting in a joint investigation to find a way to counter threats.

Basic human needs such as shelter, food, protection, and reproduction have existed since the existence of humanity, although these needs may differ in different regions, societies, or individuals, yet the concept of security became a concrete notion after nations began to exist (Demir, 2009: 12).

It is critical to emphasize that energy security is also linked to physical security factors. Energy trade, such as LNG and oil exports through seas and oceans, is highly dependent on the naval forces of states to provide safe passage, particularly the

capabilities of the USA Navy on a global scale (Shaffer, 2011: 92). To ensure energy security, it must be reliable, affordable, and environmentally friendly, which means using environmentally friendly energy sources. The last statement completely excludes hydrocarbon energy resources such as coal, petroleum, and fossil fuel-based components because their carbon emissions pose a serious threat to the environment (Shaffer, 2011: 93). Reliability means that a state has access to energy resources in the quantity needed, on a regular basis, without restrictions or interruptions. Affordability means that access to energy resources does not interfere with economic growth, but rather promotes it. Environmental friendliness means that the use of these energy resources should not harm the health of individuals or cause irreversible damage to the environment.

The concept of threat can also be defined as potential risks and hazards that can affect projects, plans, or goals of a state (Buzan, 1991: 61), or incidents or events that can negatively affect a state, society, or individuals (Krahman, 2005: 4). The concept of security basically means the state of safety or the state of absence of danger (Kucuksahin, 2007: 45). Wolfers defines safety both objectively and subjectively. Objectively, it is the absence of threat that one has. Subjectively, it is the absence of fear that one has of being threatened by imminent dangers (Wolfers, 1962: 150). The concept of threat is the reason for the fundamental existence of the concept of security.

The transformation of the concept of security has reached its peak with the attacks of September 11, 2001. This attack made it clear that the concept of security is also closely linked to global terrorism, organized crime, human trafficking, illegal migration, ethnic and religious conflicts, and the dramatic increase in weapons of mass destruction, so that the sole hegemony of the USA after the end of the Cold War has only led to anti-Americanism and anti-Westernism due to economic and social instability based on globalization (Falk, 2004: 126). The concept of counterterrorism had a global impact after the September 11 attacks and showed that international security studies are expanding to include various subtopics. All are further defined and explained in the following titles.

2.1.1. Traditional Security Issues

The concept of security is concerned with maintaining non-aggression between states or individuals. Traditional security issues are directly related to international relations. The discipline of international relations is the interaction of all political

missions of governments representing states as international actors or non-state actors among themselves (Hough, 2008: 2-3). Realism theory best explains traditional security issues, as the term is defined as the pursuit of states' self-interest, if necessary by all means of exercising power. There is no greater authority over states, which is described as anarchy (Hobbes, 1651: 64-65), so there are always immediate security threats to a state's goals and survival. Maximizing its own power is the primary goal of a state, but the balance of power is what truly maintains peace and international security. If no state is significantly stronger than another state, it cannot pose a threat to the territorial integrity of another state. In international relations, there are no friendly or hostile states, but only allies, as long as the interests of two states do not collide, which would lead to a security problem (Machiavelli, 2006: 31).

Traditional security issues focus on threats to the state itself, a state's fundamental values, political and social sovereignty, and territorial integrity. Threats can come from both domestic and foreign actors. The traditional concept of security threatens the fundamental values of a state. All values such as the lives of citizens, independence, territorial integrity, sovereignty, culture, and society are threatened by the use of hostile military action. Since the state is the main actor, it is responsible for the security of those who are within its territory (Fulvio, 2016: 2). Groups or regions that call for secessionism can also be considered a major threat in this sense. The main source of threat is the use of force to achieve the security and peace of persons living within the borders of a state that is responsible for providing security to those living within its territory. The best way to counter traditional threats is to defend a state's subjects with hard force if necessary, to maintain a balance of power, and to form alliances to strengthen a state's power by making allies rather than enemies.

It is important to also consider the means of threat when defining traditional security issues. Weapons of mass destruction, weapons, missile systems, and armies, as well as diplomatic means such as alliances, coalitions to peacefully gain allies for security purposes, can be included. An example of traditional security issues is Türkiye's foreign policy after the Nationalist Socialist Party came to power in Germany and threatened the whole world with its aggressiveness. Mustafa Kemal Atatürk has recognized the potential danger and sought to secure both Türkiye's eastern and western borders. To this end, in February 1934, Türkiye, Romania, Yugoslavia, and Greece have signed a treaty, also known as the Balkan Entente, aimed at maintaining the geopolitical status quo in the Balkans in case peace was broken

again on European soil after World War I. The treaty has been signed by the following countries: USSR, Albania, Hungary, the Kingdom of Italy. Bulgaria has refused to participate in this entente. In spite of this, treaty has entered in the force (League of Nations Treaty Series, 1934: 154-159). It was an attempt to protect the western border, but the invasion of Greece in 1941 ultimately has rendered this pact ineffective. In 1937 Turkiye, Iran, Iraq and Afghanistan have agreed on the Saadabad Pact.

In 1935, the Kingdom of Italy has violated the principles of the League of Nations and has invaded Abyssinia. In an attempt to secure its eastern border, Turkiye has pioneered a treaty that remained in force throughout the World War II, although the pact has been valid only for five years because no participating state has declared that it wished to leave the pact (Ertan, accessed 2022: 1). These two pacts are excellent examples of explaining the dynamics of traditional security issues. In the aftermath of World War I instability and a potential risk of war posed the threat of a foreign military power. To counter the potential threat before it occurs, the conclusion of pacts with mainly bordering states not only guarantees an alliance between them, but also ensures that they will not attack, since all states that signed the pact are affected. Such alliances ensure the security among states, which has been the thinking of Mustafa Kemal Atatürk to secure the state by constituting security in the region.

In the contemporary world, there are three cores that shapes traditional security:

- Territorial Diplomatic Security
- A Modern Cooperation in the Region
- Armies and Weaponry

Territorial diplomatic security is the competence of the UN, which is leading political institution of international system for resolution of conflicts and settlement of disputes if necessary (UN Security Council, 2022). Thus, its aim is to achieve collective security by implementing multilateralism. In the last two decades, multilateralism in sense of projecting peace is increasing. The EU is one of the major actors in multilateralism and pioneering in the advancement of the principles, rules, and mechanism at both global and regional levels.

Armies and weapons in the contemporary world are much more advanced and destructive since the last years of the World War II. The use of nuclear weapons in Hiroshima and Nagasaki during the World War II has proved the deterrent power of the weapons of mass destruction. It seems that the best way to achieve collective

security is to be prepared for war if it is prepared to keep the peace, as the saying goes, “*Si vis pacem, para bellum*” or as the original text goes “*Igitur quī dēsīderat pācem, præparet bellum*” (Vegatius Renatus, 1496: 1).

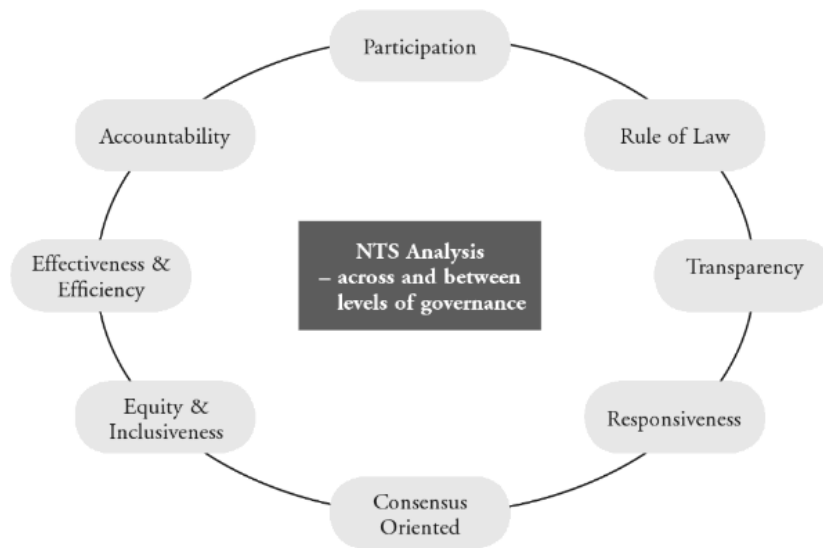
2.1.2. Non-Traditional Security Issues

Difference of non-traditional security from traditional security is the focus on kinds of threats affecting well-being of human existence other than military action. The contemporary concept of security is more related with the security of individuals. Threats emanated by non-state actors target humans and non-traditional security principles directly aim to encounter such dangers. According to Buzan’s Copenhagen School, non-traditional security threats can be defined as:

- Terrorism
- Poverty
- Human Rights Violations
- Epidemics
- Migration (Buzan, 1991: 49-59).

Cooperation among states instead of military action is much more important in this concept. However, there are eight characteristics of non-traditional security policy elaborated by the UN. It is an important basis to Figure out how the concept of non-traditional security policies reached within this framework. It explains the decision-making process by these characteristics.

Figure 1: Non-Traditional Security Analysis



Source: Cabarello-Anthony and Cook (2013)

Characteristics of non-traditional security issues are briefly explained under eight titles.

- **Participation:** Participations of all individuals are essential in the process of decision-making. Such a participation can be both directly and/or representationally. Decision makers may be informed by informal actors and/or civil society about available information, and vice versa.
- **Rule of Law:** Every person is equal before the law and is entitled to the equal protection of the law without discrimination. Rule of law is vital in order to avoid the “mob rule”. Providing a fair and accessible framework to everybody is essential in that manner.
- **Transparency:** Individuals who live within the legal jurisdiction of a state should be able to watch, track and decide in the process of decision-making.
- **Responsiveness:** Legal bodies and institutions must react in time in case of emergency or need.
- **Consensus oriented decision-making process:** Opinions of multiple stakeholders are considered in the process of decision-making. Utilization of information is essential.
- **Equity and inclusiveness:** All individuals should be able to have access in the decision-making as equals.

- **Effectiveness and efficiency:** Utilization of available sources by decision-makers.
- **Accountability:** Decision-makers should take responsibilities of their actions and deeds (Cabarello-Anthony and Cook, 2013: 10).

These eight variables help determining the characteristics of decision making of non-traditional security.

Non-traditional security issues try to resolve challenges against survival against individuals. These are mainly non-military factors. These factors can be described as climate change, food scarcity, epidemics, irregular migration, human trafficking, transnational crimes, and drug trafficking. Such threats are usually transnational, defying unilateral remedies and in dire need of political, economic, or social responses, humanitarian, or military too if necessary. Non-traditional security focuses on non-military threats in six characteristics. These are:

- With regards to their origins, conceptions and effects, the threats are transnational in nature.
- These challenges do not stem from competition among states or changes the balance of power, nonetheless such concepts are often defined in terms with regards to political and socioeconomical terms.
- Non-traditional security issues such as resource scarcity and irregular migration leads a disturbance in balances of societal and political concepts and hence threatens security in general.
- Threats such as climate change and scarcity are often caused by human-induced disturbances to the fragile balance of nature with immediate consequences to both states and societies which are generally difficult to reverse or repair.
- National solutions are often inadequate and would thus essentially require cooperation in regional and multilateral levels.
- The referent of security in the concept of non-traditional security is more than just the state meaning that state sovereignty or territorial integrity, but also the individuals meaning that survival, well-being, and dignity of people in both political and social levels (Caballero-Anthony, 2016: 4).

It is essential to identify threats and follow instructions to counter them properly for the well-beings and survival of individuals who live within legal jurisdiction of a state.

Both traditional and non-traditional security issues are significant concerns for energy security. In order to maintain energy exploitation and trade, addressing these issues is crucial.

2.2. Energy Security

Energy security is the availability of energy resources and its affiliation with national security for consumption. It is essential for economies in the contemporary world to have access to relatively cheaper energy. Energy resources in the world are not distributed equally, thus, not every state has the same availability to access them. International energy relations have made important contributions to both energy security and vulnerability (Overland, 2016: 123). Energy demand is as essential as energy supply for energy security. Energy efficiency and transitions of renewable energy resources are limited in specific geographical areas hence in order to achieve energy efficiency, promoting deployment of renewable energy plantations rapidly would result in significant energy security (Banovac et al., 2017: 3).

Energy security has various dimensions:

- Long-term energy security: Investments to supply energy, going parallel with economic developments and requirements in sustainable environment.
- Short-term energy security: Ability of energy system to show reaction immediately and act accordingly to the changes in the supply-demand balances (Aydin, 2015: 39).

Although states spare more budgets to renewable energy facilities in the last two decades, abandoning fossil fuel is not an option since produced renewable energy does not meet the expected demand. The need to enhance systemic flexibility became more vital due to the dramatic decrease in gas supplies.

Sustainability and provision of basic needs of individuals are crucial due to the dire need to have access to energy. It is also important to emphasize the economic growth of a state, stability in politics and general development and security of manufacturing and agriculture. There are four factors that affect energy security:

- **Physical Factors:** Some regions such as Eastern Mediterranean have more available energy resources than other regions.
- **Cost:** Building facilities for renewable energy resources are highly expensive. Hence when demand for them increases, exploitation of renewable energy resources become applicable thus would result in an increase in energy prices in order to support extraction and production costs.
- **Technology:** Advancements in technology allowed exploitation of recent energy resources more easily. Through technology, there are more access although use of technology endangers the balance of nature and carries significant risks for environment.
- **Political Factors:** Socio-political issues like conflicts among states may affect energy supply and demand thus make energy exploitation and trade vulnerable to maintain energy security. (Ienanto et al., 2021).

In the contemporary world, energy security depends heavily on energy supply. Transportation, communication, security, mobile health systems and supply lines would cripple without energy security. Naturally, there are threats to energy security. Threats to energy security of a state are:

- **Domestic Instability:** Change in the leadership, environmental values or being unable to receive energy from a major energy-producing state.
- **Relying on Other States:** Not having an energy source and being heavily dependent on other states may affect energy security. Energy supplier may not provide services due to domestic or out-state conflicts, deteriorated foreign relations or disruption in their supply lines.
- **Manipulation:** Major energy exporters may play and manipulate system in their favor.
- **Competition:** Although competition is usually good due to allowing improvements and advancements in technology to exploit energy resources, it can also affect energy security negatively or beyond repair.
- **Unreliability:** Unproven energy stores such as Li-ion batteries cannot provide the required energy hence could negatively affect energy security.
- **Attacks:** Cyber-attacks that can disrupt energy export, terrorism, natural disasters, or unintentional accidents may also lead to significant instabilities. (Farah and Rossi, 2011: 232-233).

Not only threats against the energy security have increased uncontrollably with quick advancements in industrialization, but also climate change has affected the competition in the exploitation of energy resources (Farah and Rossi, 2011: 233).

Long-term energy security relies on reducing dependence on single energy supplier to import energy from, getting rid of energy monopoly to have multiple energy exporters by exploiting fossil fuel or renewable energy resources. Signing international energy treaties ensures energy security in long-term by reducing the possibilities of threats by eliminating confusion on what to do with discovered energy resources. International treaties also reduce the cost of importing and exporting cost of energy without causing confusion or disruption in the future energy transactions.

Short-term security relies on primary energy sources and secondary fuels. Primary energy sources are crude oil, natural gas, coal, bioenergy and waste, hydropower, geothermal energy and nuclear power and secondary fuels are described as oil products and biofuels.

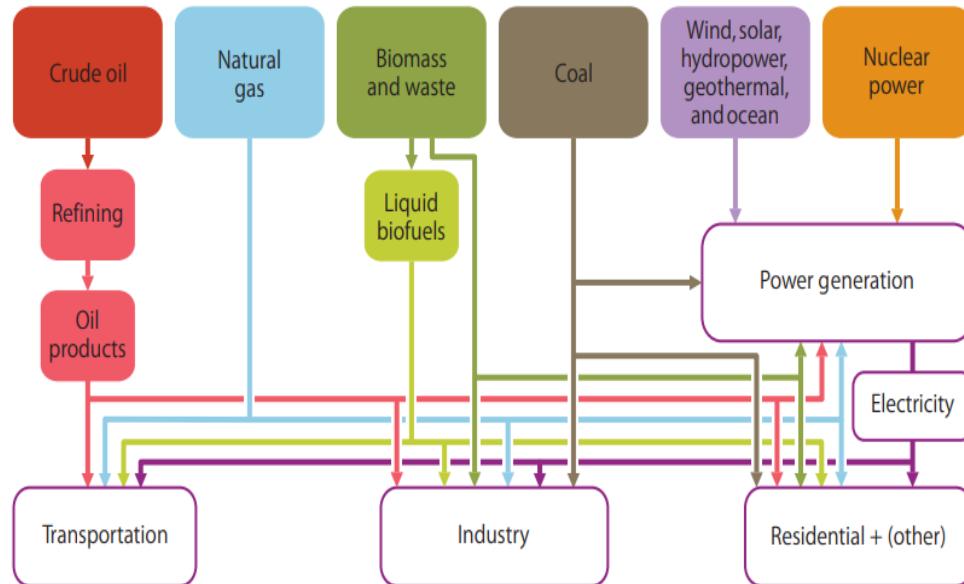
Energy security has been considered within the low politics; however, it has become a part of high politics of states since the oil crises of 1970's. Geostrategic significance of energy security is incontrovertible; thus, theorists and scholars have developed energy systems approach. This defines every aspect of non-traditional energy security.

Energy security does not mean supply and demand security only, it involves the dimensions of energy security expanded to environmental and climate securities as well. The fossil-fuel-based energy usage causes environmental pollution. As a result, in middle and long terms it may cause food shortages, climate changes, destruction of agricultural areas and increase carbon dioxide oscillation, which may lead to serious crises.

Environment and climate change caused by use of hydrocarbon energy resources enforce the states to focus on the renewables in order to prevent environmental pollution (Aydin and Azhgaliyeva, 2019: 7). Renewable energy resources have the potential of minimizing the energy security threats, however, they do not meet the required energy demand of global economy. Renewable energy means that unlimited energy that can be reinforced within the utilities of nature. Types of renewable energies are solar energy, wind energy, geothermal energy, hydroelectric energy, bioenergy, and ocean energy. All mentioned energy types are clean and have

the potential of being accessible globally, depending on the utilities of states (WWF Turkiye, 2019).

Figure 2: Energy Systems Approach



Source: The IEA Model of Short-term Energy Security (MOSES) (2011)

The IEA predicts an increase in renewable energy production of 320 GW (IEA, 11.05.2022). That would cover the electricity demand of the Western European states such as Germany. Current public policies might endanger the energy growth in the future; however, it is estimated that renewable energy capacity will be expanded by the end of 2023.

2.2.1. Historical Background

Events in the Middle East between 1956 and 1973 have shaped the concept of energy security.

On July 26, 1956, Gamal Abdel Nasser, then President of Egypt, suspended all assets of international oil companies in order to nationalize the Suez Canal and confront the West. The UK and France did not miss this and took countermeasures by freezing the accounts of Egyptians living in their countries and declaring their intention to take control of the canal. On October 29, 1956, the UK, France, and Israel launched an attack on the Suez Canal, but the UN demanded that the aggressors withdraw from the region, and on November 6 these terms were finally accepted. However, before the

ceasefire, Egypt sank their ships and destroyed facilities to block the canal (Haghighi, 2007: 37).

An economy of Europe took a critical hit due to the mentioned developments. The Suez Canal was vital for energy supplies of Europe because roughly 69 million tons of fossil fuel have been transferred from the Canal to Europe. Blockade of the Suez Canal was one of the first warnings declared to the world to generate a concept of global energy security.

During the Arab-Israeli six-day war in 1967, Egypt blocked the Suez Canal once again due to their ongoing conflict with Israel. Representatives of Abu Dhabi, Algeria, Bahrain, Egypt, Iraq, Kuwait, Libya, Qatar, and Saudi Arabia, together with representatives of Lebanon and Syria proceeded to cease oil export to states that support policies of Israel or hostile to the Arab states in the conflict. Shipments continued after a brief halt however, oil embargo resumed to the USA, the UK, and West Germany. Results of this embargo did not make the impact Arab side predicted.

- **The USA:** Energy trade of the USA with Arab states only remained symbolic because the fossil fuel export constituted less than 5 per cent of total oil consumption of the USA.
- **Western Europe:** Due to the earlier crisis, Europeans stockpiled energy supplies thus had not affected by fossil fuel embargo.
- **Iran and Venezuela:** These states are two major fossil fuel producers out of Arab League which they supplied importers throughout embargo.
- **Modern Tankers:** New tankers of that period became massive to pass through the Suez Canal hence the location began to lose its significance to the West.
- **Swap:** Arab League failed to prevent Swap agreements as they intended (Haghighi, 2007: 39-40).

On October 6, 1973, Syria and Egypt declared war on Israel with the aim of reclaiming the territories Israel had occupied since 1967. The Arab League fossil fuel exporters declared they would cut oil production by 5 per cent and reduce it still further until Israel withdrew to its natural pre-1967 borders. Saudi Arabia stated that fossil fuel exports from Aramco, a major oil company in Saudi Arabia, would cease if the U.S. refused to change its policy toward Israel in favor of the Arabs (Haghighi, 2007: 40). The U.S. rejected Saudi Arabia's demands so as not to allow them to use the fossil fuel embargo as a weapon whenever they wished. However, this was not the only

reason, as U.S. officials assumed that the Saudi embargo would not have a major impact on the U.S. economy, just as it did not in 1967. On the other hand, Saudi officials sought to ensure that non-Arab energy suppliers would not undermine their embargo and therefore closely tracked how to prevent barter arrangements.

Fossil fuel exporting states feared a decline in their revenues due to the embargo and therefore increased export taxes to compensate for the profits they would lose by halting production. The adverse effects of such gradual cuts would reduce energy exporters' profits, so they took countermeasures to address potential threats, such as conserving oil stocks, restricting the sale of gasoline and the use of fossil fuel vehicles, using electricity when not necessary, and limiting the heating of buildings. Oil was available on European markets throughout the period, yet the price continued to rise.

Import prices for fossil fuels quadrupled. The price of a barrel rose from 3 USD to 11 USD and 65 cents in January 1974 (Haghighi, 2007: 42). Inflation and economic fluctuations led to a crisis, so that production in factories decreased due to unemployment caused by the economy. A fluctuating imbalance in the global payment system threatened the monetary balance in the world. The shortage of oil in the markets worried some countries, causing them to turn directly to exporters to meet their needs as much as possible. This action is also known as “panic buying”. Consumer concern did not abate, and they continued to buy products at higher prices.

The dominance of a handful of states in the energy market has proven to be a disadvantage more than once. One can manipulate or cripple energy supply lines at will when global energy security is not at stake. In today's world, attitudes toward global energy security have changed for the better. It was necessary to build trust to avoid chaos and stability, and that is the reason why countries have contributed to energy security in the world.

The vast Eastern Mediterranean region has created new disputes and conflicts between the littoral states (Goldthau et al., 2020: 3; Tagliapietra, 2013: 13). Every actor in the region wants to get a share of the discovered hydrocarbon energy reserves (Dal, 2020: 79), so greed and a long history of disputes disrupt cooperation between these states (Demir and Tekir, 2018: 655).

Not only the actors around the Mediterranean Sea, but also other actors such as Russia are involved as they are threatened with the loss of their energy corridor to the south. The BTC pipeline has always been a rival of Russian natural gas since it started operating in 2006, and Russia takes crude but effective precautions such as proxies

and invading neighboring countries, as happened in 2008 in Ossetia, which has been called the first war in Europe in the XXI century (Emerson, 2008: 1-4). This incident caused unrest in Europe in that it caused Gazprom, the Russian natural gas company, to refuse to supply Ukraine and thus Europe (Pirani et al., 2008: 57). As a result of these circumstances, it becomes difficult to find a peaceful solution to the current events.

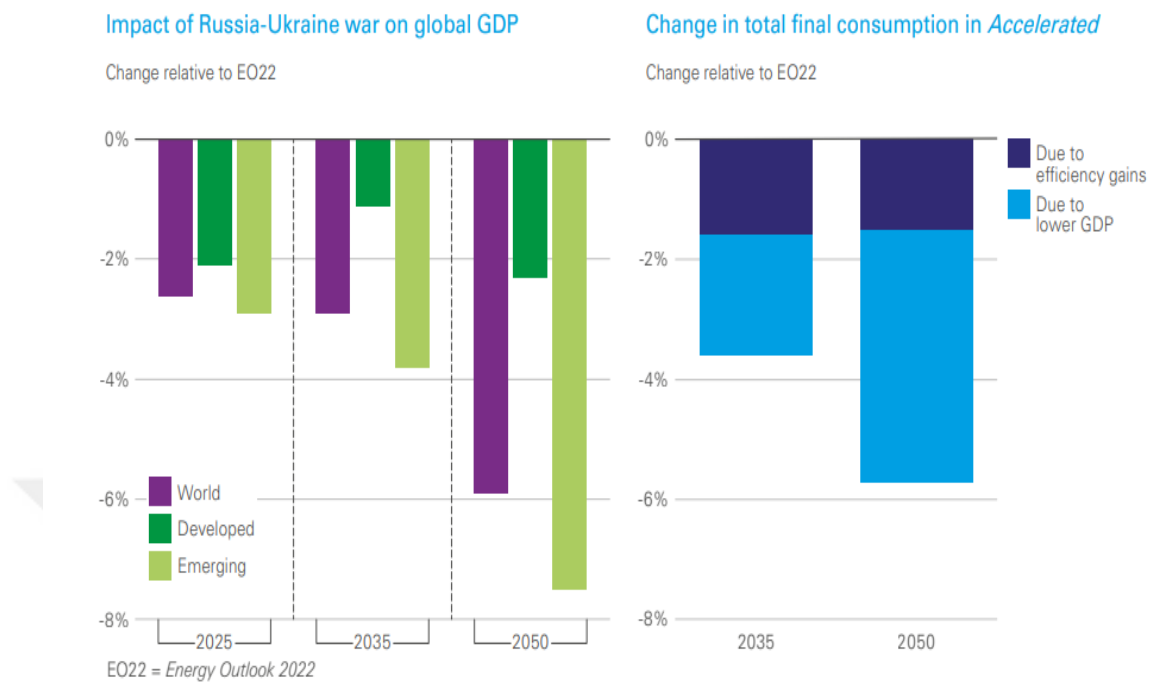
2.2.2. Supply and Demand Security

Energy security is dependent on supply and demand security. Without supply and demand, there would be no need for all these concepts. Energy cooperation among states rely on supply security and demand security, hence ensuring energy security in terms of supply and demand allows foreign investments to build facilities without concern, create new job opportunities, and develop regions socially and economically (Aydin, 2019: 241-242).

Russian invasion of Ukraine (Yeung et al., 2022) has disrupted energy supply lines from Russia to Europe (BP, 2023: 3). Looking at this situation from the energy perspective, the energy shortage in the world and Russia's invasion of Ukraine have caused various problems. It appears that these problems that have occurred are likely to have a substantial and lasting impact on global energy security. Global GDP and energy demand were revised downward due to the war between Russia and Ukraine. Naturally, concerns about energy security increased, and this led to a shift toward a more local and lower-carbon energy mix. The importance of fossil fuel imports is diminishing. Such incidents lead to vulnerabilities. Understanding the vulnerabilities of the energy system is critical to figuring out how to fix leaks (Jewell, 2011: 7). Russian oil and natural gas production has declined as a result of the war.

The security of supply and demand depends on mutual understanding. Both sides must agree on the import and export of energy resources. Let us take the energy relations between Germany and Russia as an example: Germany guarantees to import/purchase a certain amount of natural gas from Russia, and Russia guarantees to export/sell a certain amount of natural gas to Germany. The mutual trust in energy transactions between these two selected countries shows that the security of supply and demand works in this sense. In summary, to achieve supply and demand security, one party must guarantee the demand and the other party must guarantee the supply of the needed products for the global system to function without vulnerabilities.

Figure 3: The Russia-Ukraine War Leads to a Downward Revision in the Outlook for Global GDP and Energy Demand



Source: BP (2022)

The Russian invasion of Ukraine has implications around the world. Energy supply and demand are key parts of this conflict that are affected. The data presented in Figure 3 show that global GDP and energy demand have declined dramatically.

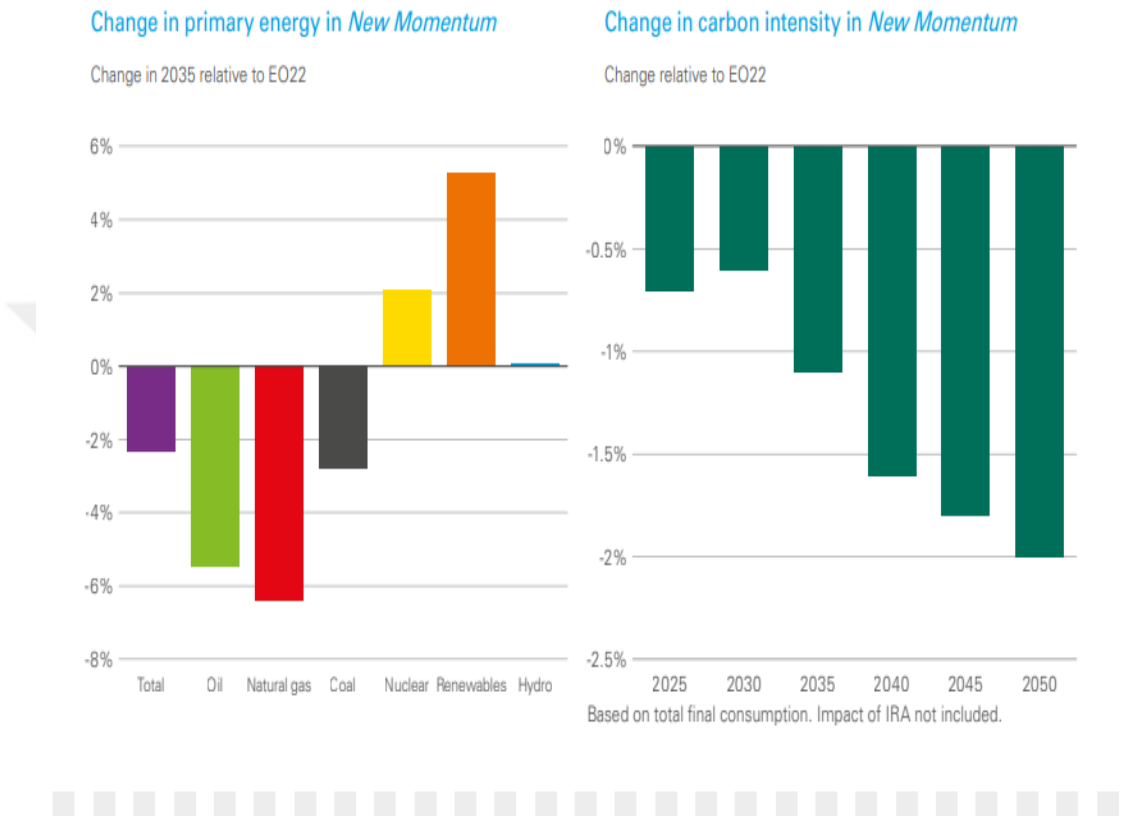
The ongoing Russian-Ukrainian conflict has disrupted and likely irreparably damaged the security of supply and demand, causing nations to seek alternatives. With renewable energy insufficient to meet global demand, states began looking for alternatives, and energy resources discovered in the Eastern Mediterranean proved ideal for getting rid of Russia's monopoly in gas trading.

2.2.3. Transformation of the Energy Security Attitudes

The shift in attitudes toward energy security has begun with the collapse of energy security due to conflicts around the world, which has drastically reduced confidence in foreign suppliers of fossil fuels. States have tended to produce energy domestically, i.e., presumably from renewables and energy sources other than hydrocarbons, unless there are existing hydrocarbon energy sources on their territory or in their maritime area. Events such as wars can accelerate the energy supply

transition. Significant economic losses and disruptions in the share of fossil fuel reserves have highlighted the importance of the energy transition to renewables.

Figure 4: Increased Energy Security Concerns Trigger a Shift Towards a More Local, Lower-carbon Energy Mix



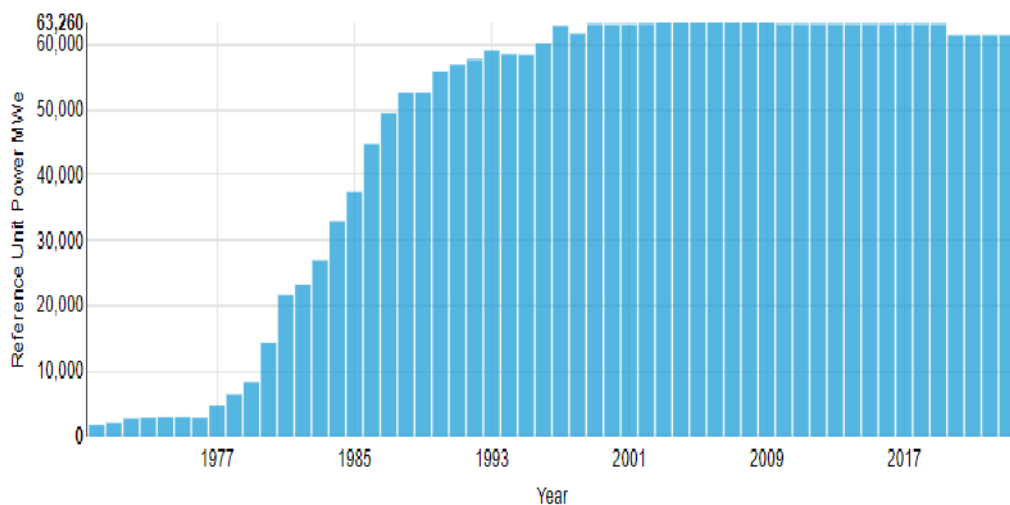
Source: BP (2022)

Natural gas and oil are two main traded energy sources. Because current energy trade is highly dependent on these two energy sources, the global shift to renewable energy is likely to affect demand for fossil fuels. The 2 per cent reduction in primary energy demand in 2035 compared to the 2022 energy revision of BP is expected to be primarily due to a 5 per cent downward revision in fossil fuel demand and a 6 per cent reduction in natural gas demand. (BP, 2023: 27). Ongoing effects mainly concentrated in emerging Asia and the EU. It is important to note that these countries still rely heavily on fossil fuels.

In addition to natural gas and oil, coal consumption is also declining, but at a slower rate than the other two. In many parts of Asia, nations have domestic coal reserves, so heavy use of domestic coal is far from over. Although fossil fuel imports

and low-level energy demand are under severe pressure worldwide, the use of renewables or existing fossil fuel reserves is increasing due to major energy security concerns. There are no hydrocarbon energy reserves in most parts of the world. This shows that the use of any locally generated and consumed energy that is not based on fossil fuels is in trend. Although the use of hydropower remains unchanged, the use of renewable energy is increasing. The use of nuclear energy has been questioned worldwide due to past accidents, such as the Fukushima disaster (Black, 2011). The disruptions in energy security are currently encouraging the shift from fossil fuels to nuclear energy. Some states such as France, have been using nuclear power since 1964. According to the retrieved data, nuclear energy can supply approximately 10 per cent of global electricity demand, 25 per cent of overall fossil-fuel needs of the EU (IEA, September 2022: 29).

Figure 5: Operable Nuclear Power Capacity of France



Source: World Nuclear Association (2021)

As the data in Figure 5 show, the use of nuclear energy in France has declined since 2017, but the French still meet a significant portion of their energy needs with nuclear energy. Energy insecurity due to conflict is forcing states to use alternative energy resources or methods.

Energy insecurity due to ongoing conflicts on energy transport routes will almost certainly encourage the use of nuclear energy. Germany is known to be opposed

to the use of nuclear energy; however, energy insecurity has encouraged it to turn to the use of nuclear energy in addition to renewable energy (BBC News, 2022). Although Germans are very skeptical about the use of nuclear energy, six power plants in Germany generated 64,372 GW hours of electricity in 2020 (KernD, 2020). A considerable amount of energy. In the coming years, fossil energy consumption is expected to decline unless collective energy security can be ensured.

2.3. Geopolitics of Pipelines

Euro-Mediterranean gas cooperation has historically been characterized by long-term relationships formalized in long-term contracts between domestic actors in the seller and buyer states. This form has emerged more and more during the development of the gas industry in the region and dominated the energy landscape for almost half a century after the World War II. Immediately thereafter, gas markets in the EU have been shaped by the gradual imposition of the European internal energy markets by the European authorities (Kuzemko, 2014: 16), which initiated a head-to-toe transition from existing energy systems to a well-defined target model defined by the EU institutions (Tholens, 2014: 48; Surrell, 2018: 99).

An Israeli export pipeline to Türkiye, regardless of its size and route, will have to overcome a number of important geopolitical obstacles related not only to increasing volatility in the region, but also to the political conditions required to build a multibillion-dollar investment that will have to operate for decades. What are the different route options for a Leviathan-Ceyhan pipeline?

Onshore via Syria/Lebanon: The first theoretical route of such a pipeline would essentially bypass both Cyprus and Lebanon by crossing Syria into Türkiye, probably along the route of the Arab Gas Pipeline. Türkiye and Syria were only a few months away from completing construction of a gas interconnector with a capacity of 3 to 5 BCM per year before the civil war broke out in 2011.

As long as the Golan Heights issue between Israel and Syria remains unresolved, a post-Assad regime will likely have higher priorities than facilitating Israeli gas before addressing existing problems or rebuilding a Syria in ruins. Convincing the Delek Group, Noble Energy, or especially Woodside Petroleum to invest billions of U.S. dollars would be impossible with 10 to 15 BCM of gas per year passing through such volatile substances in Syria. Since Assad regained control of Syria, Turkish-Syrian relations have remained strained.

The plan to use the Cypriot EEZ, bypassing Lebanon, and the idea of laying the second pipeline route in Blocks 3, 9, 12, and 13 before entering Turkish-controlled territorial waters of the TRNC was proposed by former U.S. Ambassador Matthew Bryza, who sits on the board of Turcas Energy.

Figure 6: Pipelines, Claims and Counter Claims in the Eastern Mediterranean



Source: MEES (2020)

Since the conflict in Cyprus is insoluble, restoration of the broken relations between the Turkish and Greek sides is far from possible. TGCASC seems unwilling to tie its gas export options to the resolution of the conflict. Although there are some TGCASC politicians who would not oppose a Turkish pipeline as an alternative to their Vasilikios LNG terminal, they would obviously not favor the Turkish pipeline instead of their own, especially if the decision would directly affect their pipeline and put them at risk of being bypassed completely. The Egypt-TGCASC Aphrodite pipeline is not enough to carry the gas, so Turkiye is not pushing the incentives for the TRNC to resolve the existing conflict. If Turkiye received only 10 to 12 BCM per year

from the Leviathan through the Vasilikos for transporting Israeli gas instead of 5 to 6 BCM per year from the Aphrodite pipeline, it would be more tangible for Türkiye to agree to change the dynamics of the difficult situation. The political significance of this incentive is crucial; however, it should not be overstated if it is linked to the resumption of familiar communication between the Turks and Greeks, the two largest ethnic communities in Cyprus.

Such a restart is unlikely, given Türkiye's stubborn refusal to recognize the Republic of Cyprus as a whole when it comes to the unjust murders committed on the island in the last century. Since then, tensions have never gone away. One way to solve this problem would be to link gas transportation to mutual agreement and ship the gas to Türkiye via the Cypriot EEZ. Then TGCASC would consider a comprehensive solution to the never-ending tensions on the island and reach an agreement with the Turkish Republic on the construction of the Vasilikos LNG terminal.

Another variant to solve this problem is an Israeli-Turkish pipeline. Without solving the problems between the Turkish Cypriots and the Greek Cypriots, this pipeline should go directly through the EEZ of Cyprus from Israel to Türkiye. For this solution to become a reality, both parties must agree on their rights to this pipeline through the EEZ of Cyprus.

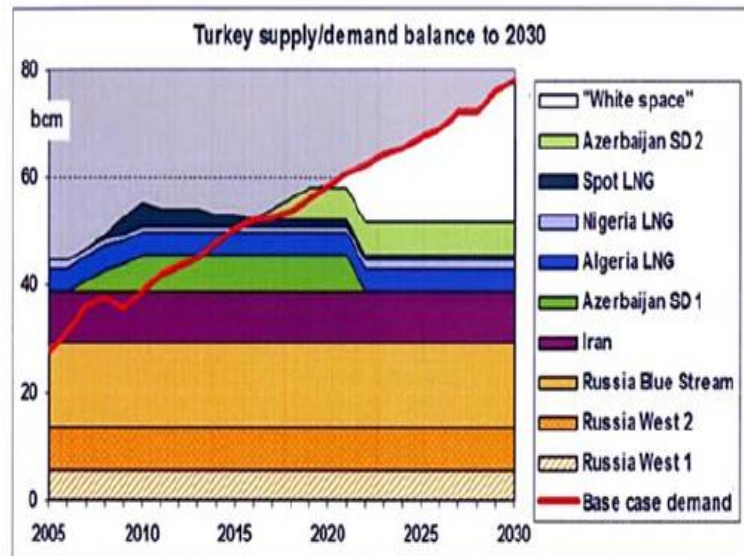
Matthew James Bryza presented productive ideas at the Pafos International Gas Conference in September 2013, stating that Noble Energy and Delek Group would use profits from gas sales to Türkiye to subsequently build the Vasilikos LNG infrastructure. There is no guarantee that the profits would be used to build the LNG terminal. Nevertheless, energy transportation in the region would serve the greater good without serious tensions, but TGCASC would never agree to this as it would mean that it would have to indirectly recognize the TRNC, which of course would be worse for the Greek party in Cyprus than profitable gas contracts. It is very likely that TGCASC would demand a quid pro quo by reclaiming Varosi, since the Greek population of the region left the town in 1974 during the Turkish peacekeeping operation or, as the Greeks call it, the "Turkish invasion of Northern Cyprus," in return for permission to build the Leviathan-Ceyhan pipeline through Cyprus for Turcas Energy, Zorlu Energy and/or Akfel Energy, but of course these are just assumptions that have no official ties. Since this is essentially a political aporia, no parties or interest groups would provide an appropriate response, as Turkish officials insist on implementing the Ankara Protocol rather than recognizing TGCASC's share (Republic

of Türkiye Ministry of Foreign Affairs, 2005). In the past decade, Israel was unlikely to maintain the de facto status of Northern Cyprus, but the sudden shift of power in international affairs due to the Russian invasion of Ukraine prompted the EU to seek alternative energy routes to end Europe's dependence on Russian energy, making a strategic alliance to connect pipelines from Israel to Türkiye imminent (Coskun and Rabinovitch, 2022). Although then-Israeli Foreign Minister Avigdor Lieberman almost destroyed any possibility that such a pipeline could even exist if it bypassed Lebanon and Cyprus. The Delek Group and Noble Energy are, of course, determined to have an alternative, and they may be unwilling to jeopardize all their investments in favor of a pipeline that would benefit Türkiye, especially if it meant that the TRNC would be recognized as a sovereign state. The only reasonable thing they could do would be to bypass the TRNC's EEZ and use Lebanon's territorial waters and/or EEZ, but removing the pipeline would cost more than expected, resulting in significant costs, especially when it comes to removing and maintaining the pipeline. Considering the years of conflict between Lebanon and Israel and their controversy a few years ago over a large area, laying a direct underwater pipeline from Israel to Türkiye is unlikely, given the size of the disputed area between Lebanon and Israel. Geography does not allow for any route for the pipeline other than the EEZ of Cyprus or the EEZ of Lebanon. Moreover, Israel's EEZ borders the EEZs of the latter two countries and is disputed. It is reasonable to assume that the possibility of an Israeli-Turkish pipeline would jeopardize any efforts by Israel to track down and destroy Hezbollah groups in Lebanon, since TGCASC and Lebanon have signed an agreement on the delimitation of their EEZs, as required by maritime law, leaving various points of Lebanon's EEZ open for future negotiation. Although this agreement has not been officially ratified by the Lebanese government, and despite TGCASC's efforts to create maritime territories in the Eastern Mediterranean, Türkiye rejected such attempts and stated that all countries around the Eastern Mediterranean must be included in an agreement to avoid violating the rights and legal maritime territories of the countries involved and to create a continental shelf and EEZ in the Eastern Mediterranean, a semi-enclosed sea (Republic of Türkiye Ministry of Foreign Affairs, 2007). Türkiye refused to recognize the agreement, which was a setback for it, although the Lebanese governmental bodies acted against each other. An imminent rapprochement of Israel and Türkiye with Lebanon would mean crossing Syria's EEZ or territorial waters. Neither Türkiye nor Lebanon has clearly defined this area.

A secure transit facility is needed to transport Israeli gas to Türkiye. Providing this option would put the TGSAC and Israel in an unbalanced semi-monopoly position vis-à-vis Türkiye. Neither the EU nor Israel nor TGCASC would like this to happen, as it would negatively impact them if Türkiye had decision-making power in this particular trade deal. The annual capacity of LCP is 8 BCM per year and a twenty-year export of this trade would mean 160 BCM, which is 43 per cent of Israel's total export potential (Tsakiris, 2014: 47). This would make Türkiye, Israel's largest trading partner. Of course, it must be remembered that while Türkiye is the first option for Israel, it is not the same for Israel. Türkiye can easily replace Israel with other LNG sources such as Azerbaijan, Iraq, Iran, and even the Russian Federation. The same is true for TGCASC. Finding an alternative market for both is quite difficult due to geography and lack of infrastructure. Israel could find another buyer for its gas in the region, but no country could take 8 to 10 BCM per year, including the pipeline infrastructure to transport the gas. Moreover, neither Noble Energy nor Woodside Energy might be willing to build a liquefaction terminal in the future if the situation unexpectedly deteriorates and Türkiye decides to stop trading Israeli exports (Tsakiris, 2014: 50). Since the liquefaction process is far more expensive than transporting gas via pipeline, it remains an unreasonable option. It can be assumed that no other private energy company would opt for this process either. In short, vis-à-vis exports, the disruption of Israel's gas trade with Türkiye is far more vulnerable than the latter.

Figure 7: Energy Demand of Turkiye is Increasing

Turkey's Growing Demand



Big (45bcm) and fastest growing gas market in Europe

- Aggressive demand growth post 2009 recession (15% growth in 2011)
- Supply security is the overriding issue
- Dependent on imports – Russia, Iran, Azerbaijan and LNG

Source: BP Azerbaijan (2020)

While it is easier for Turkiye to find buyers than for other littoral states, the market is much more difficult for exporters such as Iraq, TGCASC, and Israel, all of whom must transport natural gas to Europe via Turkiye, Greece, or Italy. Israel, in particular, has no other potential customers willing to buy 8 to 10 BCM per year, if there is any pipeline infrastructure at all. This leads to the conclusion that collective energy security and cooperation between littoral states is crucial if these littoral states are to benefit from the discovered energy resources and develop their states with energy revenues and domestic natural gas use.

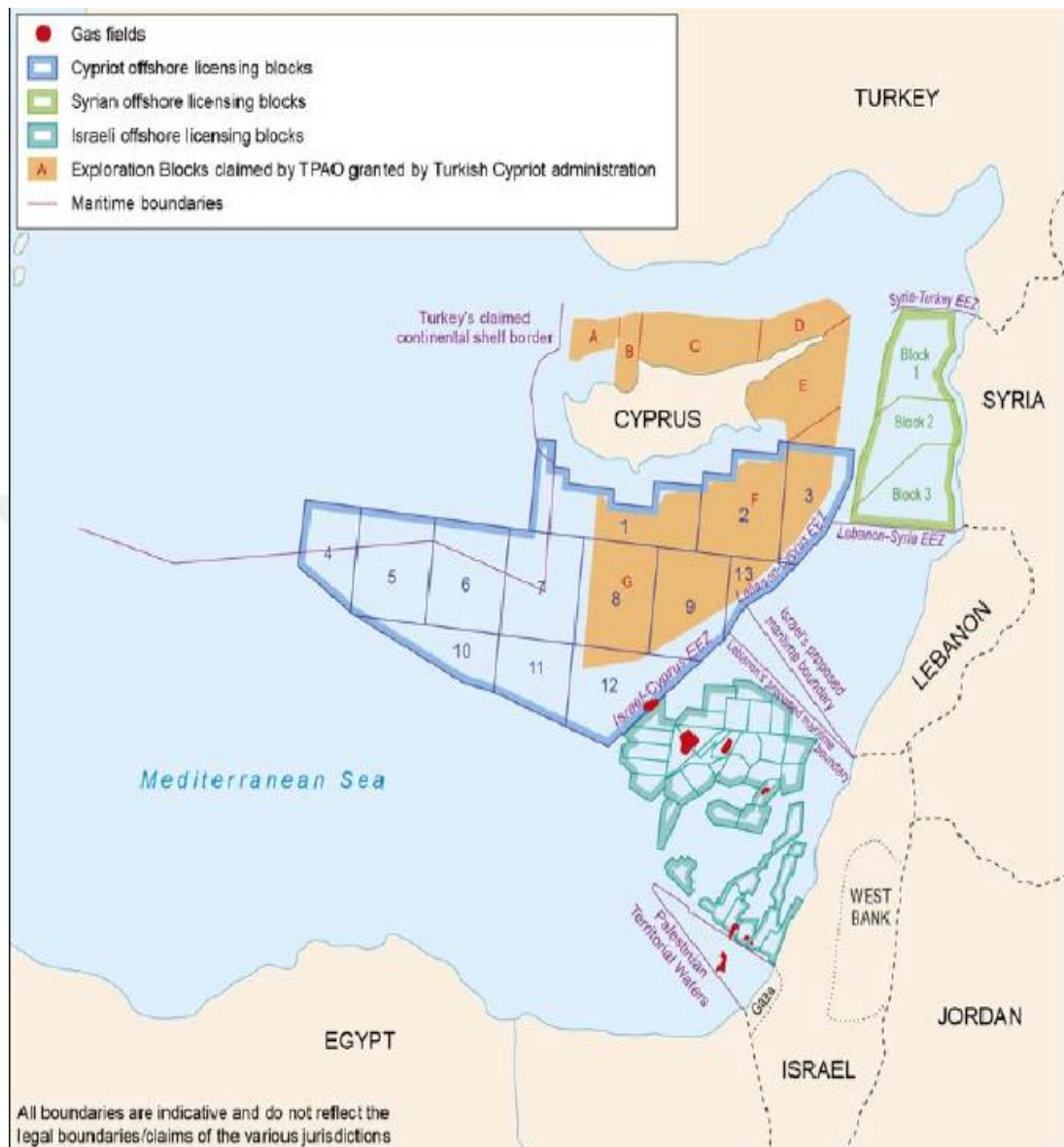
CHAPTER III

ENERGY RESERVES OF THE EASTERN MEDITERRANEAN REGION

In this part of the study, the energy resources discovered in the Eastern Mediterranean are explained. In this context, the geopolitics of the region, the great importance of energy resources for the region and the world, and the challenges in the Eastern Mediterranean are addressed.

Major offshore discoveries in the EEZ of Israel and Egypt have led to a significant increase in natural gas production in the Eastern Mediterranean in the 2010s. Natural gas discoveries in TGCASC and the TRNC are still young, but once commercial production begins, development could significantly boost regional growth. The development of midstream infrastructure in the Eastern Mediterranean to exploit natural gas is ongoing. In the region, only Egypt has LNG export capacity. Israel uses Egypt's export capacity to export natural gas from the region. Inadequate natural gas import infrastructures in Lebanon and Jordan prompted these countries to expand their capacities. Türkiye and Greece are looking to expand their LNG import capacities, increasing their status as transit countries in terms of energy exports.

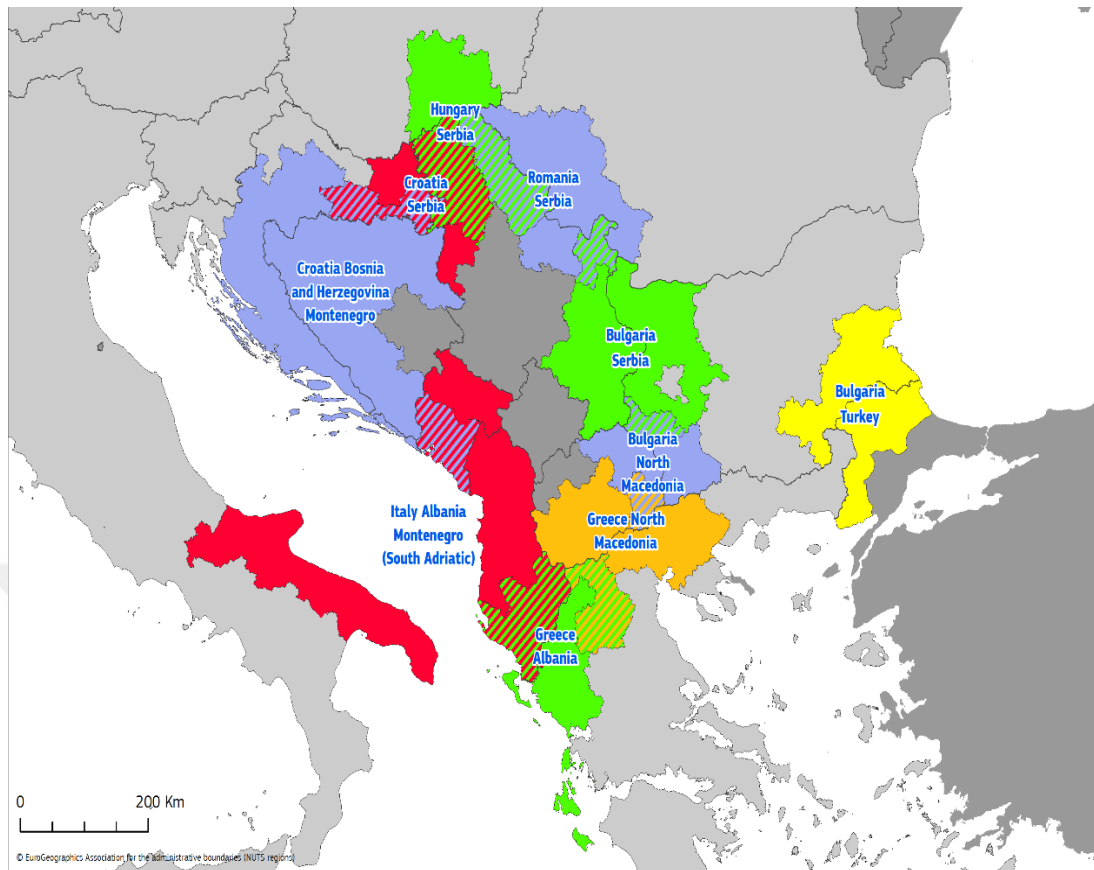
Figure 8: Indicative schematic of maritime boundaries and exploration blocks in the Eastern Mediterranean



Source: The Oxford Institute for Energy Studies (2012)

As shown in Figure 8, claims, maritime boundaries, and explored blocks can be seen in the Eastern Mediterranean. However, the EU is not only developing within its borders, but also extending its reach to countries outside the EU. By developing regional cooperation programs outside the EU, it is simultaneously contributing to energy security in the region. Securing potential energy routes ensures that there is less likelihood of instability if regional development is achieved with neighboring states.

Figure 9: Regional Development Cooperation Programs Outside the EU



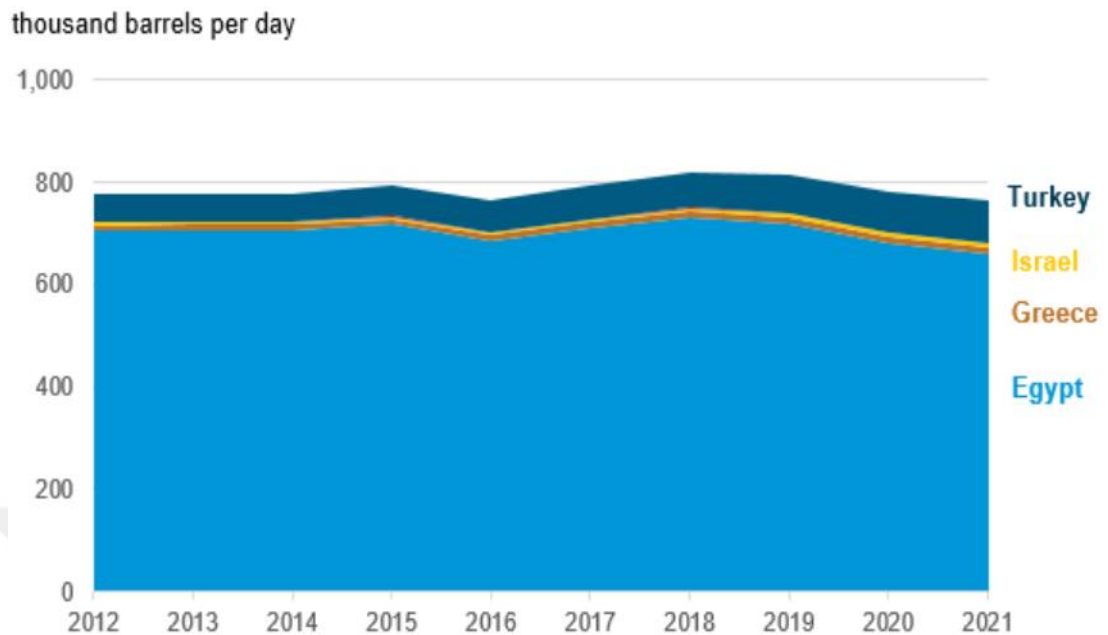
Source: European Commission (2021)

Cooperation at the regional level has existed since the founding of the first state, but modern cooperation in the region is a union like the EU, which allows nations to be independent in their own will, but there is economic and civil cooperation between member states, and they are determined to protect each other from external military threats. The EU is also extending regional development to its external borders to ward off potential threats while securing energy trade with the Eastern Mediterranean.

Regional security at its external borders is critical for the EU to achieve and secure prosperity in the region, as energy security is guaranteed.

Energy reserves are mainly located in the Middle East, Siberia, the Caspian Sea, and the Eastern Mediterranean, while EU member states consume most of the energy in the region (Shafer, 2011: 129-130).

Figure 10: LNG Production of Littoral States in the Eastern Mediterranean between 2012 and 2021



Source: U. S. Energy Information Administration (EIA), International Energy Statistics Database (2022)

The Eastern Mediterranean has rich oil and natural gas resources that can contribute not only to the development of the region but also to meeting the world's energy needs if the littoral states can fully exploit their potential. The shift of the main energy corridor from north to south and the removal of Russia's monopoly in the natural gas sector are changing the energy game until new, richer fossil fuel sites are discovered or the world shifts entirely to renewable energy. The latter does not seem possible in the next five decades, and no new natural gas or oil fields have been discovered in the Eastern Mediterranean in the last two decades. Discoveries in the energy sector have always changed the game, and now this is happening in the Eastern Mediterranean as well. States that can adapt quickly to the changes will likely survive this inferno of energy uncertainty, and those that do not will pay the price dearly. Energy reserves have implications not only for the region, but for the entire world.

3.1. Geography of the Region

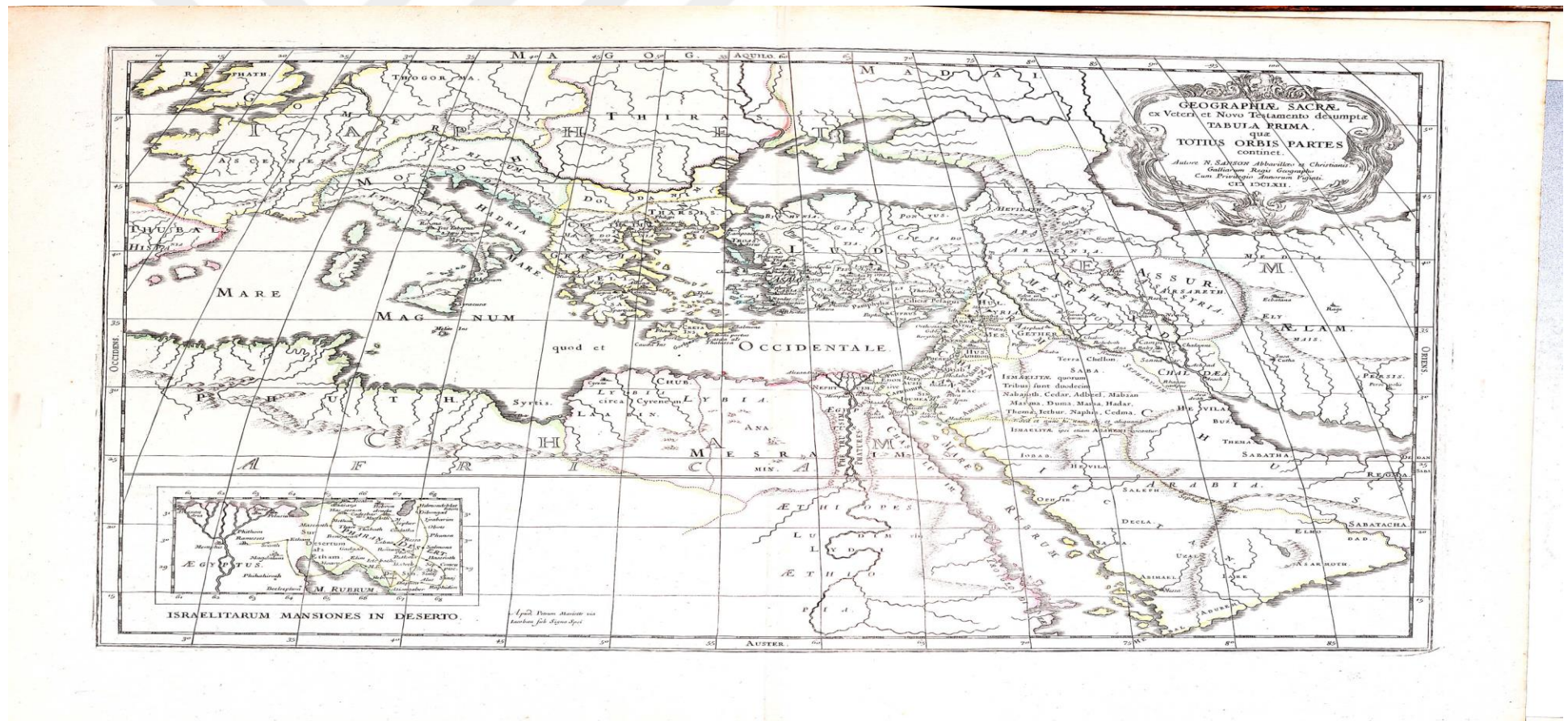
Eastern Mediterranean is a broad term for the easternmost part of the region, comprising about one-third of the entire Mediterranean Sea, that is, the area encompassing the states around the Levantine Sea. It refers to the area of the states

bordering the Mediterranean Sea and the population connected by sea and land. This area includes the Mediterranean region of Türkiye-from Hatay to Muğla-the TRNC, TGCASC, the Greek islands of the Dodecanese, the westernmost parts of Syria, Jordan, Israel, and Palestine, and the northernmost parts of Egypt, Libya, Tunisia, and Algeria.

Developments in the energy sector in the Eastern Mediterranean have revealed unexpected cooperation between littoral states such as Greece, TGCASC, and Egypt (Guzansky and Lindenstrauss, 2021: 2-3). This cooperation between the aforementioned countries and France accused Türkiye's activities in the search for energy reserves in the region as illegal (Hellenic Republic Ministry of Foreign Affairs, 2020) and a violation of Türkiye's alleged interests. Greek strategists state that the Eastern Mediterranean is the merging point of the north and the south hence the region has a crucial importance (Dokos, 2008: 27).

Since the late 1960s, relations between Türkiye and Greece have been strained due to the territorial crisis in Cyprus (Diez, 2002: 460; Brauch et al., 2003: 20-29). This is one of the core problems in the region that deliberately affecting current political, social, and economic climate in the Eastern Mediterranean.

Figure 11: Map of the Eastern Mediterranean and the Middle East



Source: L Brown Collection World Atlas Nicolas Sanson (1695)

3.2. Brief History of the Region

Military importance of the region is well known since the Romans. The Eastern Mediterranean connects North Africa, the Middle East and Europe and Cyprus is located in the center of the region. Cyprus is the biggest island in the Eastern Mediterranean and Romans took control of the island by their superior navy and dominated Eastern Mediterranean until the 4 C.E., the first empire to use and dominate the region militarily so (Unal, 2005: 7).

The most fertile lands in the world such as Mesopotamia, Anatolia, and Egypt are within the territory of the Eastern Mediterranean. These wealthy and fertile lands were wanted by everyone hence the biggest advancements of humankind and balance of power of strongest empires in the history took place in the region (Kaya, 2007: 5). When the historical process is examined, it is crystal clear that the region witnessed the firsts and beginnings in the history. The reason behind is that the fertile land of Eastern Mediterranean has seen too many conflicts over the control of the region in the past, and now for the energy reserves.

In the VII century, Umayyads became the first Muslim state in the Eastern Mediterranean, Abbasids followed them in the IX century and afterwards the Byzantine Empire retook the control of the region (Oztuna, 1969: 51).

In the late XVI century, the Ottoman Empire improved their trade fleet enormously and then had the biggest trade fleet in the Eastern Mediterranean (Yildiz and Yasar, 2012: 32). That dominance also allowed the Ottoman Empire to militarily control Eastern Mediterranean and eventually the Ottomans remained the sole ruler of the region (Durmus, 2005: 25).

France, the UK, and Russia began cooperating with each other in the early XVIII century, vying for control of the region. Russia's long-standing desire to gain access to the Mediterranean Sea led to a rapprochement with the UK and France. These three states formed an alliance and destroyed the Ottoman navy in Navarino in 1827, which gave them access to the Mediterranean Sea (Orenc, 2009: 72). On the other hand, interests in the region changed and the Crimean War broke out in 1853. In this war, France and the UK fought alongside the Ottoman Empire against Russia to prevent Russian domination in the Eastern Mediterranean (Ucarol, 2008: 237-238).

Construction of Suez Canal by France, which has been finished between 1859 to 1869, has improved the strategic value of the Eastern Mediterranean. In the

following years, the UK took control of Suez Canal, Cyprus and Gibraltar and remained as the sole ruler of Eastern Mediterranean.

The USA appeared in the Eastern Mediterranean in the XVIII century and since their trade fleets were vulnerable to pirate attacks, the USA cooperated with regional powers (Gervasi, 1975: 20-21). In the following years, Navy of the USA took charge to protect their vessels and became a serious power in the region. Although the USA built a strong navy, not until the end of the World War II they would have the strongest navy in the world. The USA have always been interested in the region since the day they become independent (Litsas, 2020: 42).

During the World War I, the entente powers signed secret agreements among themselves to sever the Ottoman Empire. This act allowed them to gain full control over trade routes and their colonies. First agreement to be signed in such manner is 1915 London Agreement among Kingdom of Italy, France, the UK, and Russia that ensured Kingdom of Italy's control over southern part of now modern Turkiye, Tripoli and twelve islands in the Aegean Sea. Second and the most important one for the region is Sykes-Picot agreement that signed between the UK and France in 1916. This agreement ensured the French control of Syria and Lebanon and English control of Iraq hence Italy, France and the UK shared strategic locations among themselves and finalized their agreement with Armistice of Mudros in 1918 (Gencer and Ozel, 2010: 68-69).

In late 1917, Lord Balfour issued a public statement, also known as Balfour Declaration, which announces the support of British government for a national home for Jewish people in-then Ottoman soil of Palestine where only a minor Jewish population resided (Knell, 2017). France, Kingdom of Italy and then the USA recognized Balfour Declaration in that order. Palestinian Arabs protested the declaration nevertheless their efforts remained hollow. Jewish people bought properties and settled in Palestine starting from 1918. Since the Ottoman Empire lost the World War I alongside the Central Powers, Palestine was no longer an Ottoman Soil. Although Jewish settlements were growing enormously, there was no Jewish state present, not until 1948. In 1947, the UK brought the issue to the agenda of the UN, whereupon Jerusalem was granted neutral status. In 1948, Palestine was divided between Palestinian Arabs and Jews, and Israel was officially established (Armaoglu, 1991: 65-66). With the hard efforts of the USA and the UK, an ally state had been created in the Middle East. The Arab control of the Middle East and the Eastern

Mediterranean territory was challenged by Israel and since then the territory is disputed between Palestinian Arabs and Israelis.

After the end of the World War II, the UK lost its hegemonic dominance over the world and the USA assumed that role. In 1956, the UK sent troops to Suez Canal. The Egyptian government nationalized private British- and French-owned companies under the pretext that they were at war with Israel. This meant instability for the Americans in the region, but the USA took matters into its own hands and removed French and British influence from the region through diplomacy, remaining the only dominant power in the region (U.S. Department of State Archive, 2001-2009). The main aim of the USA was to remain as the only dominant power in the region, meaning that the Russian influence would be unacceptable. In this context, Washington aimed to control oil and natural gas reserves in both Middle East and the Eastern Mediterranean (Quandt, 2004: 5-6).

In the contemporary world, both the USA and Russia aim to have control over the region. After the collapse of the USSR, Russians lost their influence in the Middle East and the Eastern Mediterranean. All their attempts to regain their influence is countered by the USA, nevertheless they managed to control some parts of Syria, but their fundamental ideals dictate that they must expand their control in the region even though their invasion of Ukraine wore them off terribly.

Turkiye and Israel, two critical allies of the USA in the Middle East had to follow their own agendas in that sense nonetheless that damaged Washington's influence and interests in the region. Especially Arab Spring affected political and economic struggles in Cyprus quite negatively (Ulusoy, 2016: 335). Stability in the region is only achievable if regional and global actors can contribute for beneficial cooperation.

Power struggles in the Eastern Mediterranean such as Israeli-Palestinian and the TRNC-TGCASC conflicts brought additional problems to the region. Search for energy reserves in the Eastern Mediterranean and ownership rights of them led unresolvable dilemmas. Since the instability spread like wildfire in the region with Arab Spring, proxies also get involved with control of such territories. Alongside regional powers, the USA has a major role in the resolution of that problem.

3.3. Geopolitics of the Region

In the last decade, the Eastern Mediterranean had gone through significant geopolitical changes. The Middle East and the Eastern Mediterranean are interconnected with each other and developments both regions have gone through in the last two decades and impacts of such developments have extended beyond the boundaries of both regions respectfully. Especially Europe is the most affected region by these developments.

Approximately 12 per cent of global trade and 30 per cent of global container trade is happening through Suez Canal alone, which is 1 billion USD worth of trade, 10 per cent of global oil and 8 per cent of LNG trade is allowed via Suez Canal (New Zealand Foreign Affairs and Trade, 2021). This signifies the potential and importance of the Eastern Mediterranean.

Change in the foreign policy by the ruling party of Turkiye, AKP, led to difficulties with littoral states in terms of maritime energy security and linkages between the Eastern Mediterranean and Europe, hence increasing a geopolitical space within the region with a distinct significance (Tziarras, 2019: 5). There are four factors which define interconnected dynamics of the geopolitical environment in the Eastern Mediterranean.

Energy reserve discoveries are recent and ongoing energy reserve discoveries in the Eastern Mediterranean is one of the major elements of the shifting geopolitical and security/insecurity dynamics in the region. These discovered energy reserves have resulted in new benefits, spendings and improvements for the region. Not only littoral states but also external actors demonstrated interest in the region. Both geopolitical and geoeconomic significance of the region increased with discoveries of natural gas (Proedrou, 2012: 17; Gurel et al., 2013; Adamides and Christou, 2015: 190), also known as the “blue gold” in the Eastern Mediterranean. Such interests lead to energy insecurities in the region and affect both the littoral states and other regions, such as Europe. Such effects on inter-state relations are both positive and negative.

Geopolitical intransigence and shift in the balance of power in the region with the discovery of energy reserves in the Eastern Mediterranean then again turned out to be another reason for dissonance among littoral states, severing them into two factions. Turkiye and the TRNC making up one faction and Greece, TGCASC, Egypt and Israel making the other. Turkish relations with all these states are problematic due to the foreign policy changes of AKP. Mavi Marmara incident, also known as Gaza Flotilla

Raid, strained relations between Türkiye and Israel (Kershner, 2010) and since then relations between these two actors never recovered completely and remains cold currently. Since General Sisi staged a coup d'état and overthrew regime of Morsi (Abdelmoez, 2017: 112), Türkiye-Egypt relations deteriorated and since then, it has not been mended. Türkiye opposes the regime of Sisi thus an energy deal between these littoral states is highly unlikely. Apart from that, Türkiye and Greece have problematic relations over territorial integrity of Cyprus since 1974. Discoveries of energy resources within EEZ of the TRNC and TGCASC works up the tension between Greece and Türkiye even more. The trilateral partnership among TGCASC and Greece with Israel and Egypt separately formed an alliance against Türkiye (Tziarras, 2019: 6), since both side of the factions recognize other faction as a security threat to their EEZ, maritime jurisdiction and territorial integrity. These instabilities projected here demonstrates that without cooperation, a collective security and benefit from current findings will always lead setbacks for regional progress.

Mandatory security updates for individuals were required due to Arab revolts, acts of terrorism from ISIS, and instabilities in the region that raised concerns about people's safety. Humanitarian, social, and economic problems, supply shortages, destroyed structures, and security concerns have highlighted the need for security updates for individuals living in the region.

Increased interest in the region from external actors that do not have borders with the Eastern Mediterranean, such as Russia, the USA, the EU, and China, showed interest in the region. The EU, in particular, is focused on the region and has a great interest in energy developments in the Eastern Mediterranean region (EC, 2014). Italy, France, Germany, and the UK are closely following the updates in the region and keen to get involved with regional affairs. From Asia, increasing power of China is also eager to get a piece of the pie of wealthy energy reserves, within the framework of their Belt and Road Initiative (Lin, 2015: 65). However, Russia and the USA are the two major external actors in the region, especially in Syria. Interests of these two superpowers are conflicting, however, ongoing Russo-Ukrainian war is declining Russian influence in the region. All these clashes in the Eastern Mediterranean impacting foreign policies of littoral states and external actors, thus geopolitical bargaining affects commercial networks, collective energy security and cooperation.

In terms of energy security, Greece, Italy, Israel, and TGCASC signed a memorandum to cooperate in the energy reserve exploration and ensuring the

construction of a pipeline that would connect the Leviathan to Europe. European Commission stated that although they support the project, it appears to lack technical requirements and extremely costly. Sub-sea connection between the Aphrodite and the Leviathan pipelines that would connect the European energy markets to gas fields of Israel was crippled due to unfitting topographic difficulties, unfavorable costs, and technical insufficiencies. All these efforts would be useless if the cost of gas export exceeds the existing trade with Russia although there are energy security concerns.

Transportation costs are compared with international companies such as Gazprom, is expensive more than expected. Although it is quite difficult for the Gazprom to lower the international prices or cut off LNG imports and exports globally. LNG exports are rapidly increasing in the world and that shapes patterns of global energy trade, as it has been doing it for the last decade. Gas import and export system is built as that thus short-term gas contracts indexed are more common than long-term contracts. Gazprom policy dictates that long-term take or pay contracts are how gas import and export should happen. However, use of Russian natural gas is on the decline. In order to deal with competition with the Energy Reserves in the Eastern Mediterranean and LNG exports, Russian energy companies might be forced to drop prices on their energy exports (Umbach, 2019).

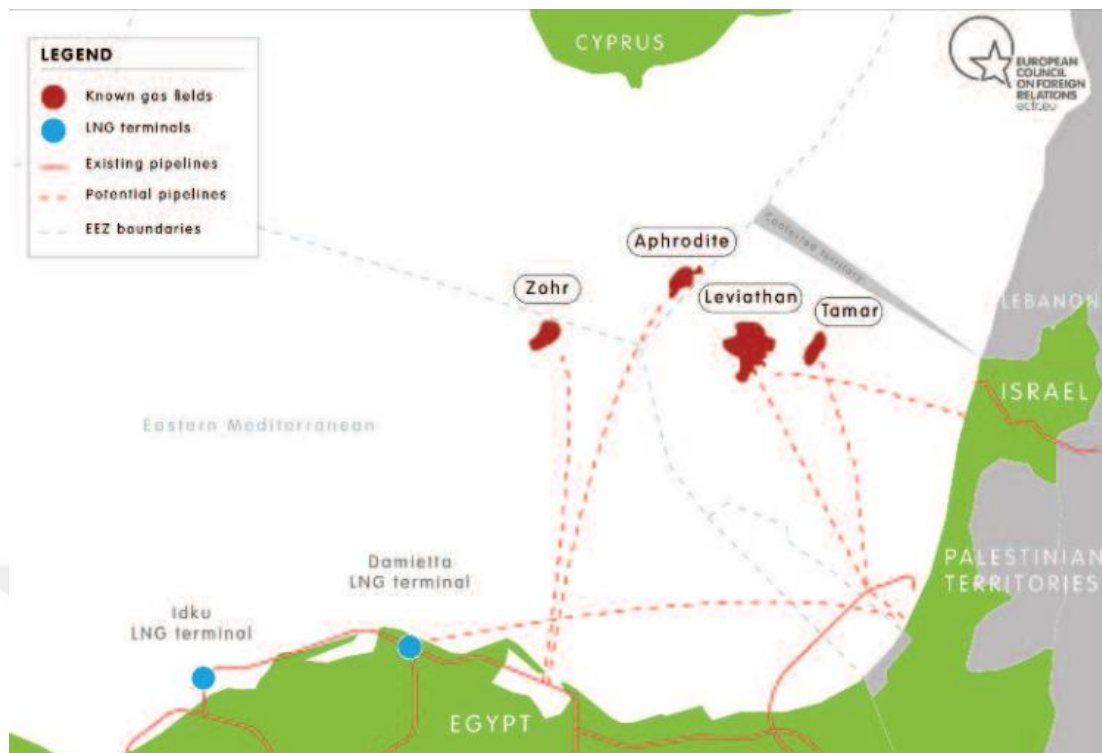
Figure 12: Potential routes for the Eastern Mediterranean Gas Export



Source: Stratfor (2018)

Without exploratory drilling, exploring true capacities of EEZ is quite difficult. Energy insecurity in the region is making this especially a harder case for littoral states. For instance, Turkish drilling and exploratory vessel Oruc Reis had to withdraw from EEZ claimed by Turkiye due to the disturbance calls from Greece and the EU (Alan, 2020). All setbacks such as these only delay the progress of the region due to the conflicts over territorial and maritime zone.

Figure 13: Gas Fields and Potential Export Routes



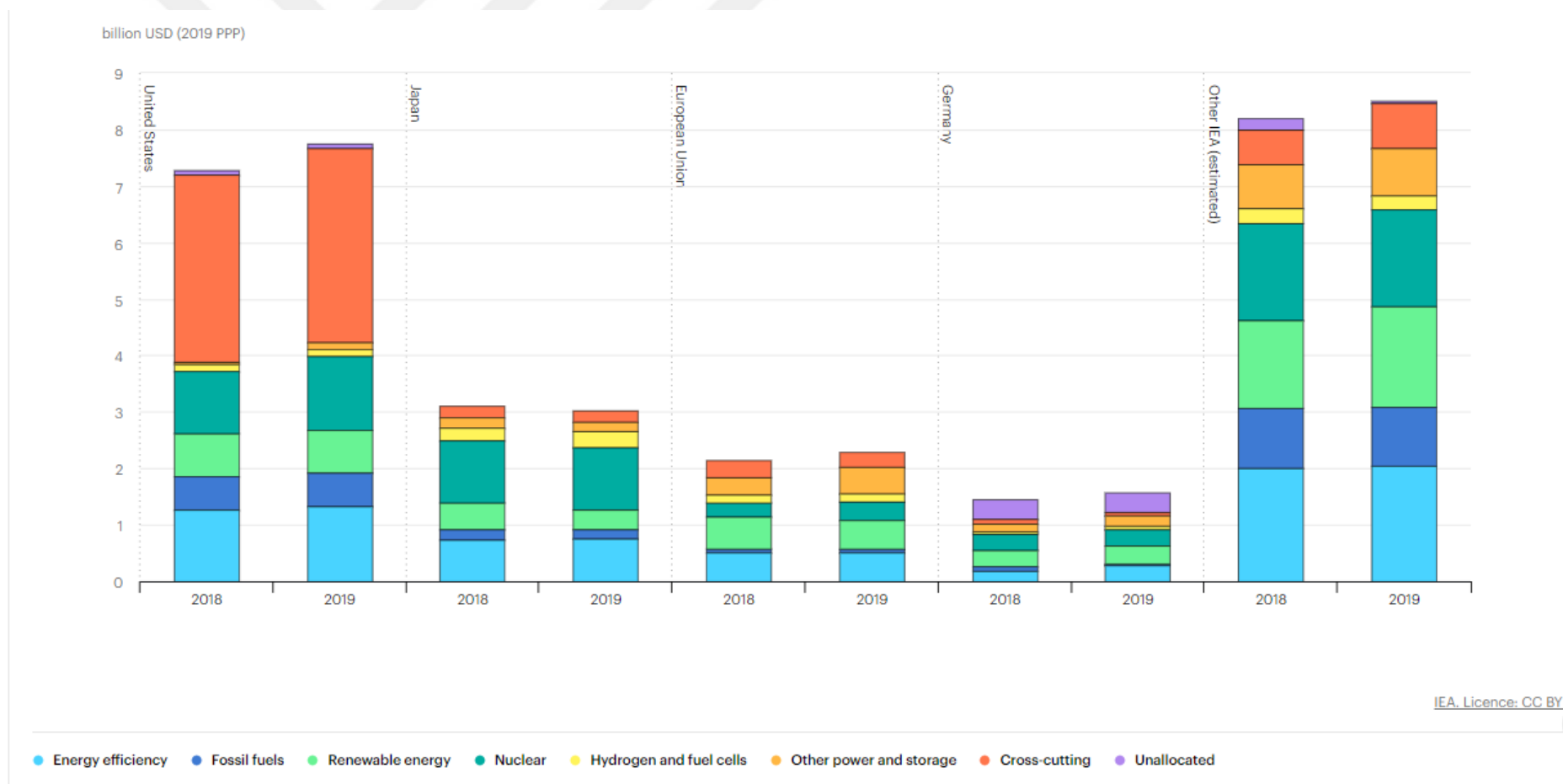
Source: European Council on Foreign Relations (2017)

These energy reserves in the Eastern Mediterranean cannot be transported or used in any way because there is no pipeline available for export. Diversification in the gas process strategy of the EU will be remained restricted unless a bigger solution with participation of littoral states is achieved.

3.3.1. Economic Importance of the Region

Eastern Mediterranean area has gone under significant changes since 2000s. The developments in the area exceeded its own boundaries and become more and more leashed to Europe (Tamcelik and Kurt, 2015: 675). Rise of terrorist organizations such as ISIS and withdrawal of the USA from the Middle East caused a major economic and political instability in the Eastern Mediterranean region. Such occurrences forced states in the region to seek alternatives in order to avoid unexpected interruptions to their energy transportation instruments.

Graphic 1: 2018 & 2019 Budgets by Technology in Selected IEA Countries & the EU



Source: IEA Natural Gas Monthly Statistics (2022)

Energy security requires an energy budget to provide required consumption. In order to ensure gas security among states, contribution to the establishment of gas market is crucial.

Pipelines are used broadly for transporting various energy materials such as oil and gas, however, due to technical necessities, it is vital and apparent that gas is the most prominent material amongst all. Nevertheless, alternative ways for gas transportation are also emerged such as LNG and one-third of the entire gas trade is conducted with this method (Colantoni et al., 2016: 10-19).

Looking at the geohistorical and international energy status of the XX century, this area was targeted by the great powers since the early 1900s. It can be argued that one of the reasons for the World War I was to possess these natural resources, and this is, of course, a correct statement, because all parameters show us that the great powers had and have an interest in this region. The UK, in particular, recognized the importance of fossil fuels and natural gas more than any other state, and during its imperialist era made efforts to appropriate rich territories through military operations. The British realized that coal would soon become obsolete, and so their main goal of obtaining and controlling oil-rich areas became (Vidakis et al., 2017: 40).

The UK did not only take advantage of acquiring every opportunity in its colonies, but also being active in other regions in order to compensate for its lack of natural resources (Alobeid et al., 2018: 243). Until the end of World War I, the Ottoman Empire held territories with rich gas such as Mesopotamia, the Middle East, and Arabian Peninsula. The territorial integrity of the Ottoman Empire blocked the way of British interests, thus, British interests required to remove Ottoman influence out of the way in order to take control of the territory and prepare it to serve its own purposes (Cirakman, 2002: 164-165).

The UK had managed to secure the natural resources, particularly oil in Persia, but the extracted amount did not meet the expected sufficiency (Antonius, 2015: 243-244). Furthermore, the UK always favored its allies by granting them preferential agreements, such as promising Arabs to establish their own kingdoms, the so-called liberation of Izmir by Greeks and formation of so-called Kurdistan and Armenia (Siusiuras and Kutsukes, 2012: 36) in that context, the British bought the loyalty of its foreigner subjects, and they worked in favor of British interests. The betrayal Hussein, the Emir of Mecca to the Ottoman Empire, led him to negotiate with the British

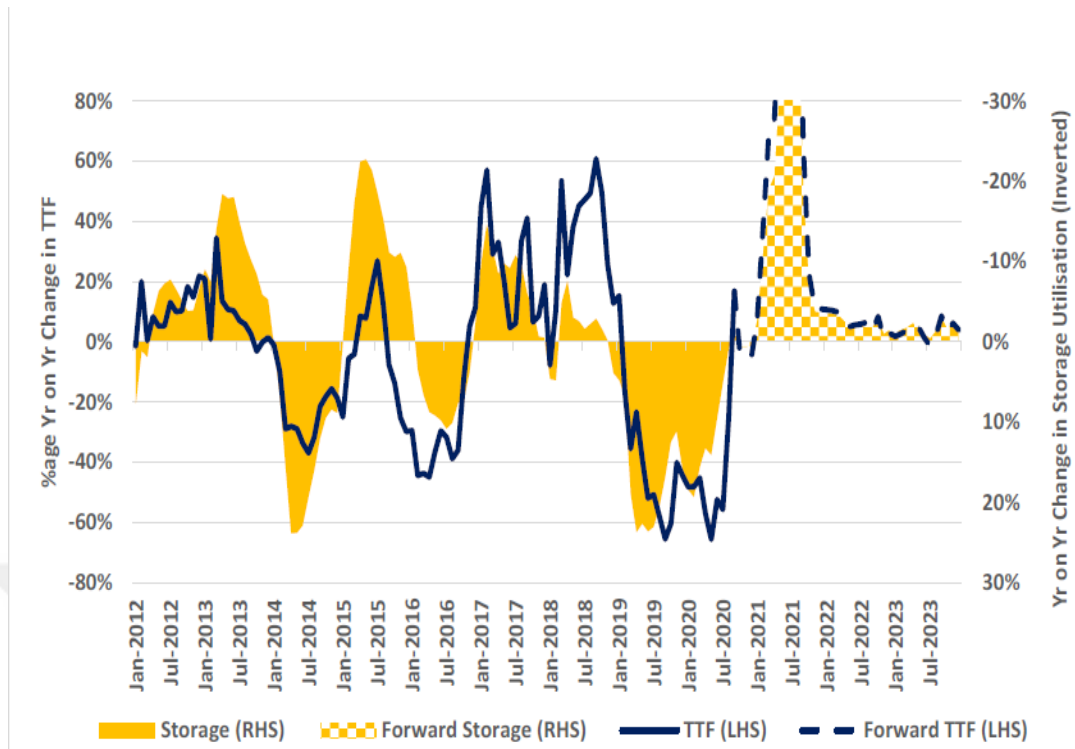
Lieutenant Colonel McMahon, who established the belief in cooperation and the creation of new Arab states, which led to rebellions and subsequently the dissolution of the Ottoman Empire (Holt, 1966: 87).

After the fall of the Ottoman Empire, the West had to accept the establishment of a secular Turkish state, unlike the theocratic predecessor in order to keep Turkiye as a buffer state to Soviet imperialism (Vidakis and Baltos, 2013: 86). The USA wanted to make sure of the continuousness of the flow of oil from the Middle East to the West without the reach of malicious Soviet intentions to warm Mediterranean waters (MacGwire, 1988: 26).

Since the conflict between Russia and Ukraine started in late February of 2022, Europe has been facing another gas shortage due to opposing Russian invasion of Ukraine. Lack of sustainability of renewable energy and anti-nuclear attitude of the EU forces it to be dependent on Russian gas.

Gas demand for European Market decreased in 2020, however, in 2021 overall gas demand around the world rapidly increased and climbed above gas demand in 2019. Such events led LNG supplies to increase. Consequently, Russian invasion of Ukraine (Kirby, 2022) is expected to increase demand for LNG, or else, increase of natural gas prices is inevitable. Russia stated that they will only sell natural gas in Russian Ruble instead of USD (Espiner, 2022). Meaning that Russia intends to have control over overall natural gas trade in their respective terms.

Graphic 2: Year-on-year change in storage utilization and TTF gas price



Source: Oxford Institute for Energy Studies & data from Argus Media (2021)

The broader area of that has changed enormously since 2010s. The developments taking place within the Middle East and the Eastern Mediterranean have become increasingly interconnected and the impact has extended far beyond their borders, especially to Europe.

It has been repeatedly argued that the recent and continuing discoveries of hydrocarbons in the Eastern Mediterranean have been among the main reason to change the political and economic atmosphere in the region. The energy reserves have resulted in something else entirely different hence aims of the global and regional actors changed in a military, political and economic sense.

The extent to which this strategy is coherent or effective in terms of the individual and collective interests of the participating states remains to be seen. Apart from the fact that Türkiye has so far been excluded from energy planning in the Eastern Mediterranean, it has understandably never abandoned its own interests and pursues its own agenda militarily, politically, and economically (Tziarras, 2019: 5-11).

Stakeholders around the world faced the challenge of making the world more environmentally friendly, but it was not an easy task to accomplish in a single day. The world has experienced other energy turns before, but this one is different. In the

past, the world switched from one energy source - wood, coal, oil, electricity - to another, and the fuel transition was driven by the invention of the steam engine, the internal combustion engine, and the light bulb. As technology evolves, it also becomes more and more difficult to successfully make the change. The goal of sustainable growth has become increasingly important. The challenge is to use the existing system as efficiently and effectively as possible while driving the changes needed to manage current and future changes (Westphal, 2021: 9-10).

At least in the OECD, energy policy has been guided by three principles: Security of Supply, Affordability, and Sustainability. At the global level, this presented the trilemma of simultaneously addressing security of supply, environmental sustainability, and energy equity, as articulated by the World Energy Council. The overarching goal of combating climate change and promoting sustainability is based, for good reason, on the belief that a sustainable energy system creates synergies among the three goals. In the past, the balancing of energy policy goals and priorities usually took place at the national or regional level. In international relations, governance approaches have traditionally focused on energy security, defined as national energy security. International governance organizations were built to ensure security of supply and demand. In the 1990s and after the end of the Cold War, the focus shifted to human security, focusing on people and their living conditions. A new emphasis was placed on the global commons. This represented a paradigm shift, and today the guiding principle of sustainable energy security is bridging the gap between individuals and the global commons. These paradigm shifts are also reflected in new governance organizations such as IRENA. What we have witnessed since the turn of the first decade of this century is a new model of governance by goals and targets.

This new governance model was a way out of the governance crisis that resulted from the inability to manage an energy transition from the top down. It provides flexibility to states, and there is hope that bottom-up goals will be achieved. National pledges and nationally determined contributions are expected to help achieve the common goal. The global climate regime requires a recurring sequence of reporting, monitoring, and increasing ambition. This requires translation into specific national and regional energy policies, such as emissions trading schemes, and these may differ significantly from country to country or region to region, leading to a high degree of uncertainty about the future paths of different actors and their interactions at the regional and global levels. Even when the end point is agreed upon, the nature,

timing, and sequencing of actions associated with particular energy sources and solutions are not clear. In order to reduce transaction costs, limit free-riding, and create as large and level a playing field as possible, converging, and harmonized instruments must be developed by coalitions of the willing. Finally, energy is of course a cross-cutting issue that intersects with climate, environmental, economic, and industrial issues. The energy transition is part of an industrial revolution, as are digitization and artificial intelligence.

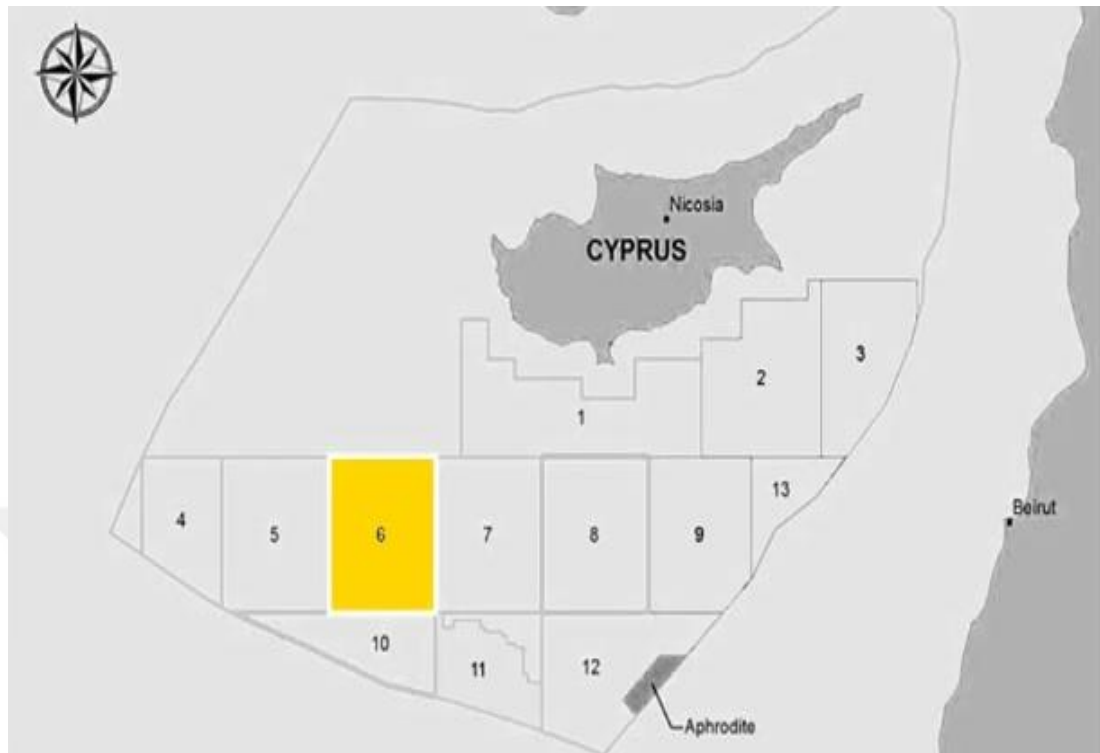
3.3.2. Political Importance of the Region

Throughout history, the Eastern Mediterranean has been the center of civilization and myriad political disputes and struggles. Having significant geostrategic importance, every faction wanted to control the region. The geopolitical importance of the region mainly comes from connecting three continents, respectively Africa, Asia, and Europe. All critical trade routes connecting the east to the west are located in the Eastern Mediterranean, also connecting the Black Sea to the Atlantic Ocean, and Gibraltar to the Suez Canal (Kedikli and Deniz, 2015: 400-403). Since the importance of the Eastern Mediterranean is that significant, the region always has been within sight.

Political disputes intensified even more with energy reserve discoveries thus geostrategic importance of the region increased. For instance, Israel discovered the Tamar, the Dalit, and the Leviathan, which are three significant natural gas fields within the maritime EEZ of Israel in 2009. Estimations about the potential of these natural gas resources worth more than 200 years of natural gas consumption in Israel (Ratner, 2011). Such discoveries enforced littoral states in the Eastern Mediterranean to explore within their own respectively EEZs for potential hydrocarbon energy resources.

The existence of energy reserves in the Eastern Mediterranean has been known for some time and when Italian private company Eni discovered the largest gas field region near the coast of Egypt, it made a huge impact on the energy market (Masoni and Jewkes, 2015: Reuters). Discovery of the Zohr field, which is located within the Shorouk concession nearly overshadowed previous discoveries. Blue gold just added more importance to the region. Thus, without any doubt, it was clear that new problems and conflicts in the Eastern Mediterranean were just imminent. After that, TGCASC discovered a gas field, also known as Calypso-1 in 2018 within Block 6 (ENI, 2018).

Figure 14: Calypso-1 Natural Gas Field Offshore Cyprus at Block 6



Source: ENI Press Release (2018)

Italian natural gas and oil corporation ENI is present within TGCASC since 2013 and operating within Blocks 2, 3, 6, 8, 9, and 11. The present political situation within Cyprus is tense since 1974 and only the southern part of it is benefitting from the deal with ENI. The TRNC and Türkiye protested this one-sided deal and joined for exploration of energy reserves in the Eastern Mediterranean for their claimed EEZs, hence sent Barbaros Hayrettin Pasa, which is a seismic vessel, and then two drilling vessels named Fatih and Yavuz (Temizer and Bir, 2019). Since the tension between Türkiye and the TRNC with Greece and TGCASC was at top level, Turkish Naval Forces assisted drilling vessels with warships, cruisers, and corvettes. Naturally Hellenic Navy deployed their own ships and this created energy insecurity in the Eastern Mediterranean over the confrontation of two major powers in the Aegean, that are also NATO partners. However, officials from Türkiye stated that the Turkish mission in the Eastern Mediterranean is only limited to hydrocarbon research within Turkish claimed EEZ and Turkish maritime jurisdiction is valid in the area where the Turkish continental shelf is declared to the UN (UN General Assembly Letter, 2019: 1-2).

Disputes over maritime jurisdictions and claimed EEZs in the region escalated a crisis, where a military confrontation was on the brink between Türkiye against France and Greece. Turkish exploratory vessel Oruc Reis has been sent again on a mission to discover new energy reserves; however, Greece protested this move by Ankara, hence sending military aid to Greece against Türkiye (Reuters, 2020).

The EU declared the unilateral discovery activities of Türkiye unlawful and thus charged Türkiye with invading the EEZ of TGCASC (Smith, 2019). However, Türkiye protested that decision and Turkish officials stated that TGCASC violates the maritime jurisdiction and territorial integrity of the TRNC thus it is unlawful for only the southern part of Cyprus to sign international energy agreements and benefit from it (Sheppard et al., 2020). As a result, Türkiye sent more drilling vessels in order to defend the rights of the TRNC, however, they had to call their vessels off due to deescalate strained relations with Greece and TGCASC due to the downward pressures from the EU (Hurriyet Daily News, 2020). Tension in the region appears to be dropped, however, it has only submerged into the abyss, and it is only a matter of time for more disputes and conflicts to be resurfaced.

3.3.3. Cultural and Social Diversity of the Region

Its location in the middle of trade routes and crossroads connecting the east with the west and the north with the south, respectively, made the region a rallying point for cultural interactions. The people and cultures of the Mediterranean are more diverse than a single entity. The Mediterranean shows how diverse communities are through different ethnicities, religions, linguistic and cultural differences (Molho, 2004: 123). Normally, people and cultures around the seas have commonalities, but this is not the case in the Mediterranean. Throughout history, many republics, kingdoms, and empires have emerged in the region, and yet none of them has managed to create a single stereotype. The cross-cultural border location of the Mediterranean allowed people and cultures to interact with each other over a long period of time. Venice, for example, ruled the Eastern Mediterranean for nearly five centuries and was home to tolerance of people's religious and philosophical differences, offering protection to anyone persecuted for their ideas or political views.

As Alberto Tonini defines, *“keeping away from ethical universalism and religious dogmatism, Mediterranean modernity should be inspired by a tolerant and inclusive ethical-religious pluriversalism”*. (Tonini, 2020: 2). That is, universalism

dictates a form, a stereotype, and thus separates individuals, cultures, and peoples. Universalism eventually leads to intolerance, exclusion, or cultural assimilation, as was seen in the late Roman Republic. Romans did not accept the non-Romans into their society because of their ethnic and cultural background. They did not have the same rights as Romans unless they served in the Roman army for more than 15 years, only then were they given legal rights, but were still not considered Romans by most parts of society.

Civilization, religion, political and cultural structures of the peoples around the Mediterranean helped shape the region as it is known today. A long and complicated history also shapes the politics of today.

The lack of a single, static, and stereotypical model of identity may make it seem that Mediterranean peoples are different, but there are many commonalities among Mediterranean peoples. In my personal experience, the bazaar culture is very similar among Turks, Greeks, Italians, and Spaniards, except for the siesta, which is common among Italians and especially Spaniards. “Nazar boncugu”, also known as talisman for the evil eye, is also used in Türkiye, Greece and Italy in the belief that it is to keep the negative away from where it is. As is well known, there are a number of debates between Turks and Greeks about who owns which traditional dishes, as both peoples claim to have identical dishes. Food culture is almost identical in Türkiye, the Middle East, North Africa, and the European Mediterranean.

Although Western globalization has influenced and shaped the world with its cultures, Mediterranean cultures retain their own cultures, traditions, religions, and languages.

3.4. Importance of Energy Reserves of the Region

Contrary to popular belief, competition for hydrocarbon reserves in the Eastern Mediterranean has begun since the first discovery in the region. The Russian-Ukrainian war has only exacerbated the shift of energy corridors from north to south. Littoral states, external players, and private energy companies are scouring the Eastern Mediterranean with the aim of turning the region into a major energy transportation hub. After two gas crises between the EU and Russia in 2006 and 2009, Europeans looked for alternatives and discovered the region's potential, despite the insecure energy supply and lack of interconnected infrastructure (Raimondi, 2023).

Only Israel and Egypt are extracting natural gas from their own EEZs, while Turkiye, the TRNC, Lebanon, Jordan, and TGCASC are just beginning to play a new role in the region, while Israel and Egypt already are. The EU is taking even more precautions in terms of energy security and is trying to reduce its dependence on hydrocarbons by increasing its reliance on renewables (Rau et al., 2022: 6-7).

The Russian concern about the Eastern Mediterranean is the loss of their natural gas export monopoly. Understandably, this would have a huge impact on the already struggling Russian economy, which has been further weakened by the war in Ukraine. In addition, Russia has threatened the EU with cutting off natural gas shipments from Russia to Europe if a standoff occurs. In terms of energy security, the Eastern Mediterranean region must be functional for natural gas exports. This is crucial for the EU. The conversion of energy supply from hydrocarbons to renewables is in great demand, but it takes too long, costs a lot of money, and cannot provide the required amount of energy. These facts make the blue gold that rests in the abysses of the Eastern Mediterranean particularly valuable and essential to exploit. Infrastructure development within the EEZ is being stepped up, but political tensions between Turkiye and other littoral states, especially with Greece, over claimed EEZs, territorial jurisdictions and maritime disputes complicate the situation and leave matters unresolved. The EU is aware of the problem and threats that may arise from such unfortunate circumstances and is therefore taking measures to deal with potential threats, damage, and problems.

3.4.1. Total Amount of Energy Resources

According to the data, total oil reserves is approximately 1,650,585,140 barrels, total natural gas reserves is 6,922,922,000 MCF and coal reserves are 1,139,471,430,000 tons in the entire world (Worldometers, 2023). Energy reserves in the Eastern Mediterranean consists of a considerable amount of energy resources in the world. That signifies the importance of the region in the world.

According to the estimates (Table 1), Egypt has the largest reserves of natural gas and oil within their EEZ, followed by Israel albeit approximately tenfold smaller than the largest reserve. Turkiye, Greece, and Jordan have below one TCF of discovered natural gas resources in total. Lebanon has no significant natural gas reserves at all.

Table 1: Oil Reserves of Littoral States in the Eastern Mediterranean in 2022

Country	Million Barrels of Oil Reserves
Egypt	3,300
Turkiye	371
Israel	13
Greece	10
Jordan	1

Source: Oil & Gas Journal (2021)

Egypt appears to have the largest oil reserves among littoral states in the Eastern Mediterranean (Table 1). Between 2012 and 2021, Egypt produced approximately 702 thousand barrels of LNG per day. After the discovery of the Zohr natural gas field, their production increased slightly. On the other hand, Türkiye produced approximately 66 thousand barrels per day in the same timeline. Israel produced approximately 13 thousand barrels per day and Greece produced five thousand barrels. However, Lebanon, Jordan, the TRNC and TGCASC had low amounts of production (Table 1).

Table 2: Natural Gas Reserves of Littoral States in the Eastern Mediterranean in 2022

Country	Natural Gas Reserves in TCF
Egypt	63.30
Israel	6.22
Jordan	0.21
Turkiye	0.11
Greece	0.04

Source: Oil & Gas Journal (2021)

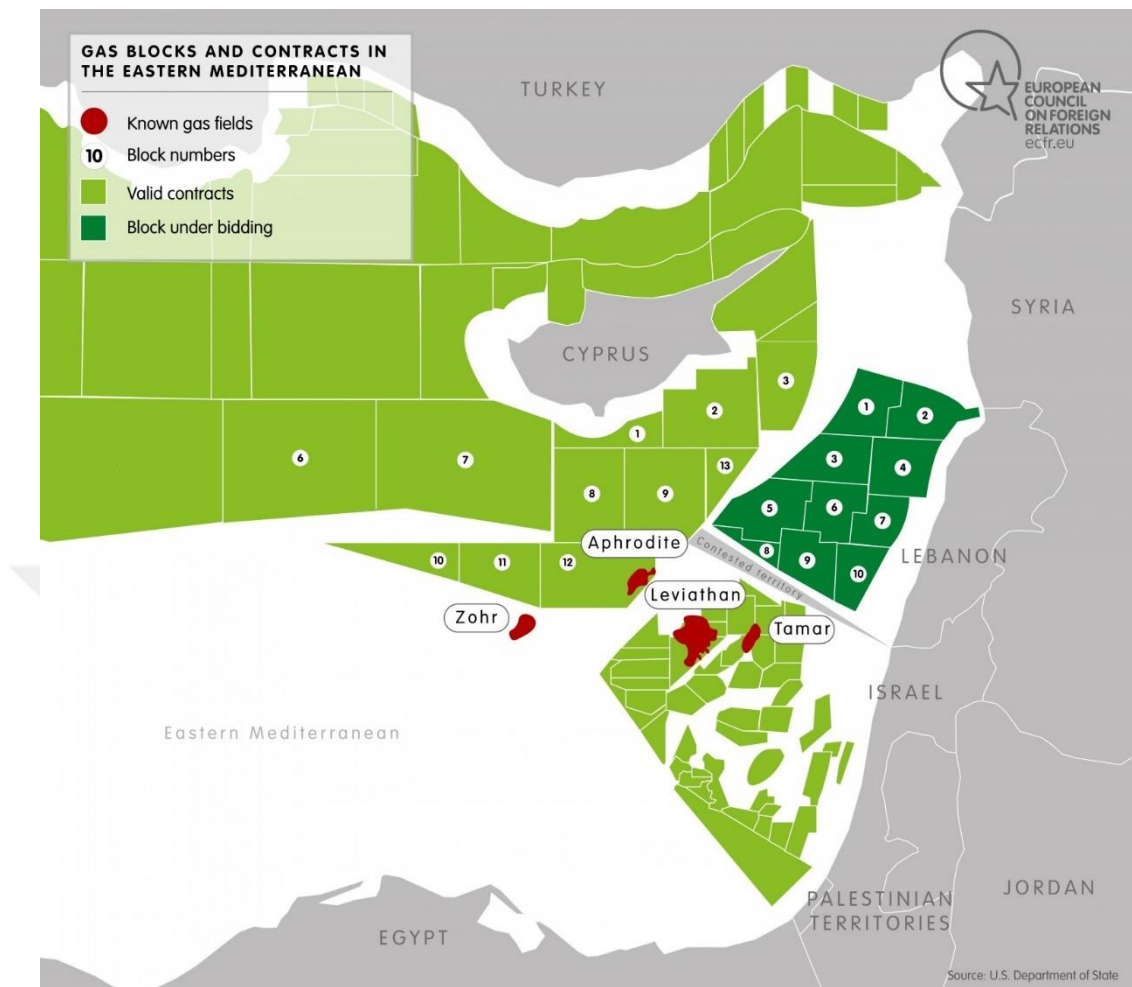
Egypt produces more natural gas from their reserves than any other littoral state in the Eastern Mediterranean (Table 2). Between 2012 and 2019, Egypt produced 1.9 TCF every year (EIA, 2022). Natural gas production of Egypt decreased until commercialization of the Zohr natural gas field in 2017. There were no discoveries

and finally that changed with new explorations. Starting from 2018, Egypt increased natural gas production by 40 per cent, which is approximately 2.1 TCF.

Israel is the second largest natural gas producer in the region. In the same timeline with Egypt, approximately 276 BCF of natural gas was produced by Israel (EIA, 2022). After discoveries of the Karish, the Tanin, and the Leviathan natural gas fields, it is expected to increase natural gas production capabilities of Israel (Table 2).

Turkiye and Jordan produce insignificant amount natural gas reserves, thus, the domestic production is very low (Table 2). Average natural gas production of Turkiye is approximately 16 BCF and that amount for Jordan is 5 BCF between the same timeline for Egypt and Israel (EIA, 2022). The Risha natural gas field is only production facility of Jordan, whereas domestic natural gas production of Turkiye is mainly from west of Istanbul and offshore in the Black Sea. The TRNC's, TGCASC's and Greece's production enough lower.

Figure 15: Gas Blocks in the Eastern Mediterranean



Source: European Council on Foreign Relations (2017)

Existence of undiscovered natural gas fields withholds the true potential of hydrocarbon reserves in the Eastern Mediterranean. However, currently proved natural gas reserves demonstrates that there is a significant amount of energy resources in the Eastern Mediterranean. Table 3 demonstrates the discovered natural gas reserves within the claimed EEZs by some of the littoral states.

Table 3: Gas Discoveries

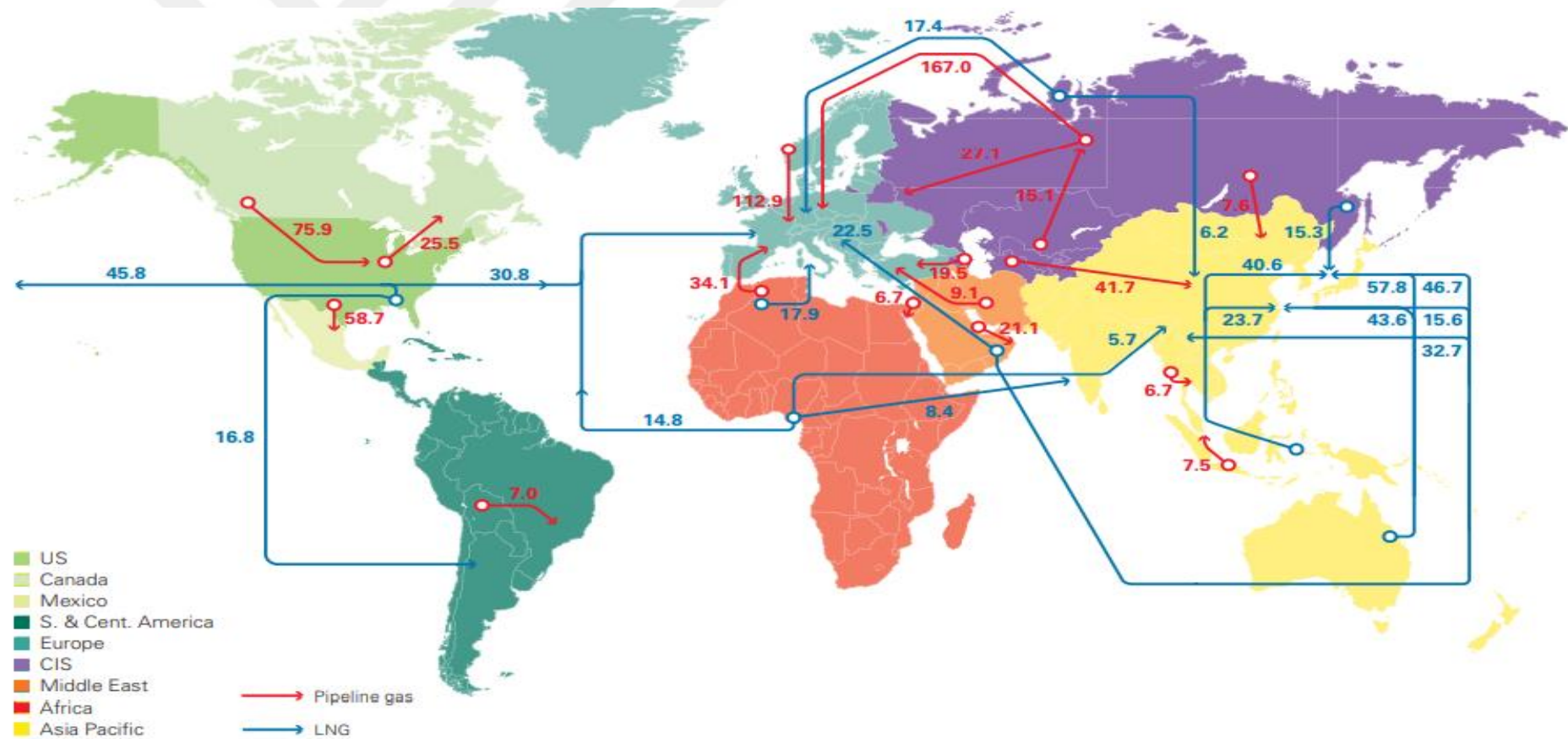
Countries	Gas Reservoir	Discovery Date	Location	Operator	Estimated Startup Date	Estimated Peak Production Level (BCF a year)
TGCASC	Aphrodite	2011	Block 12 offshore deepwater	Noble Energy	2029	202
	Calypso	2018	Block 6 offshore deepwater	Eni	2036	276
	Glaucus	2019	Block 10 offshore deepwater	Exxonmobil	2038	276
	Croonos	2022	Block 6 offshore deepwater	Eni	n/a	n/a

Egypt	Zohr	2015	Offshore Nile Delta Basin	Eni	2017	1144
	Raven	2004	Offshore deepwater N. Alexandria Block	BP	2021	0.23
	Bashrush	2020	Offshore Shallow water	Eni	2025	0.05
	Baltim Southwest	2016	Offshore shallow water, Baltim block and Nile Delta Basin	Eni and Egyptian General Petroleum Corporation	2019	0.16

Israel	Leviathan	2010	Offshore Deepwater Blocks I/14 & I/15	Chevron	Phase 1A: 2020 Phase 1B: 2026 Phase 2: 2030	779
	Tamar	Phase 1 & 2: 2009 Tamar SW: 2013	Offshore Deepwater Block I/12	Chevron	Phase 1: 2013 Tamar SW: 2019 Phase 2: 2027	585
	Karish	2013	Offshore Deepwater Block Alon C	Energean	2022	0.22
	Karish North	2019	Offshore Deepwater Block I/17	Energean	2023	104
	Athena	2022	Offshore Deepwater Block 12	Energean	2027	0.05
	Tanin	2012	Offshore deepwater Block Alon A	Energean	2028	0.11

Source: EIA (2022)

Figure 16: Natural Gas Trade Flows Worldwide in BCF



Source: BP Statistical Review of World Energy (2022)

Figure 17: Natural Gas Trade Movements 2021 by Pipeline in BCM

Billion cubic metres				From																			
To	Canada	Mexico	US	Bolivia	Other S. & Cent. America	European Union	Norway	Other Europe ¹	Azerbaijan	Kazakhstan	Russian Federation	Turkmenistan	Uzbekistan	Iran	Qatar	Other Middle East	Algeria	Libya	Other Africa	Indonesia	Myanmar	Other Asia Pacific	Total imports
Canada	-	-	25.5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	25.5
Mexico	-	-	58.7	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	58.7
US	75.9	†	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	75.9
North America	75.9	†	84.3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	160.2
Argentina	-	-	-	4.5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4.5
Brazil	-	-	-	7.0	0.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7.1
Other S. & Cent. America	-	-	-	-	0.8	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.8
S. & Cent. America	-	-	-	11.5	0.9	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	12.4
European Union	-	-	-	-	-	-	80.9	11.2	8.2	-	132.3	-	-	-	-	-	34.1	3.1	-	-	-	-	269.8
Rest of Europe	-	-	-	-	-	12.3	31.9	-	11.3	-	34.7	-	-	9.1	-	-	-	-	-	-	-	-	99.3
Europe	-	-	-	-	-	12.3	112.9	11.2	19.5	-	167.0	-	-	9.1	-	-	34.1	3.1	-	-	-	-	369.1
Belarus	-	-	-	-	-	-	-	-	-	-	18.7	-	-	-	-	-	-	-	-	-	-	-	18.7
Kazakhstan	-	-	-	-	-	-	-	-	-	-	2.7	-	-	-	-	-	-	-	-	-	-	-	2.7
Russian Federation	-	-	-	-	-	-	-	-	-	4.6	-	10.5	-	-	-	-	-	-	-	-	-	-	15.1
Other CIS	-	-	-	-	-	-	-	†	-	-	5.7	-	0.2	0.5	-	-	-	-	-	-	-	-	6.4
CIS	-	-	-	-	-	-	-	†	-	4.6	27.1	10.5	0.2	0.5	-	-	-	-	-	-	-	-	42.9
United Arab Emirates	-	-	-	-	-	-	-	-	-	-	-	-	-	-	19.5	-	-	-	-	-	-	-	19.5
Other Middle East	-	-	-	-	-	-	-	-	0.2	-	-	-	-	7.7	1.6	2.8	-	-	0.7	-	-	-	13.1
Middle East	-	-	-	-	-	-	-	-	0.2	-	-	-	-	7.7	21.1	2.8	-	-	0.7	-	-	-	32.5
South Africa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3.5	-	-	-	3.5
Other Africa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3.8	4.8	-	0.9	-	-	-	9.5
Africa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3.8	4.8	-	4.4	-	-	-	13.0
Australia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4.8	4.8
China	-	-	-	-	-	-	-	-	-	5.9	7.6	31.5	4.3	-	-	-	-	-	-	-	3.9	-	53.2
Malaysia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.4	-	-	0.4
Singapore	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7.2	-	2.0	9.1
Thailand	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	6.7	-	6.7
Asia Pacific	-	-	-	-	-	-	-	-	-	5.9	7.6	31.5	4.3	-	-	-	-	-	-	7.5	10.6	6.7	74.2
Total exports	75.9	†	84.3	11.5	0.9	12.3	112.9	11.2	19.6	10.6	201.7	42.1	4.5	17.3	21.1	6.7	38.9	3.1	5.2	7.5	10.6	6.7	704.4

Source: BP Statistical Review of World Energy (2022)

Figure 16 and Figure 17 show the global trade routes and statistical movements of natural gas. By 2021, natural gas production of entire world is estimated around 4036.9 BCM and growth rate per annum between 2011 and 2021 is 2.2 per cent (BP, 2022: 29). Production of the Eastern Mediterranean natural gas is significant and can supply an important amount of natural gas demand of the world.

The resource potential of the Levant Basin met the expectations to be higher than the rest of the region and investors focused their aim attempts of the region. Rich energy reserves open the way for conflicts among littoral states, especially among Turkiye and the TRNC versus Greece, TGCASC and Israel. The maritime boundaries claimed by littoral states are only indicative, thus, the legal claims of all factions are different than each other.

3.4.2. Global and Regional Importance of Energy Reserves of the Region

The importance of energy reserves in the Eastern Mediterranean is critical to the world because they increase energy security and have the potential to diversify energy supplies and provide alternatives to the current supply corridor. Investment in the Eastern Mediterranean is increasing, putting the region in a better and better position to mitigate natural gas shortages in the energy market and build collective energy security in the region.

The region has made a number of discoveries over the past two decades. The known hydrocarbon energy reserves are vast, but there are still so many parts of the Eastern Mediterranean that are deep in the abyss. Approximately 3 per cent of entire global natural gas reserves are already discovered within the EEZs of Israel, Egypt, and TGCASC (McMonigle, 2023).

An establishment of EMGF pioneered development of the region and helped easing the geopolitical tension existing in the region. Alongside littoral states such as TGCASC, Egypt, Israel, Palestine, and Jordan, Greece, Italy, and France are making up the members of the EMGF.

Discovered energy reserves in the region are essential for development of littoral states by supplying themselves with wealthy natural gas resources and export them to external boundaries of the Eastern Mediterranean in order to boost economy. Geopolitical location of Eastern Mediterranean also adds up to importance of its energy resources in sense of accessibility.

To sum up, globally it allows states to maintain energy security by creating alternative with discoveries hydrocarbon energy resources in different geopolitical areas and for the region, it is essential to secure natural gas supplies in order to boost economy by exporting other states and supplying domestic natural gas demand by retrieving.

3.5. Challenges on the Energy Reserves in the Region

The Eastern Mediterranean has rich energy reserves, but they bring challenges as well as opportunities. Economic opportunities bring territorial disputes, and new discoveries of energy reserves bring a deterioration of energy security. How do such significant disputes arise? What are the challenges of not sharing discovered energy reserves? All of this is explained under four headings.

3.5.1. Political Challenges

Political challenges are directly linked with energy security. Turkish-Greek dispute over Cyprus that escalated in 1974 is the most significant political challenge in the region. Türkiye's argument for the resolution of the conflict is a two-state system in Cyprus, however, Greece strongly opposes that. Only Türkiye recognizes the TRNC, thus, the EEZ and the maritime jurisdiction in the Eastern Mediterranean is challenged by all these factors. Other littoral states and the EU ignore the existence of the TRNC government and only address TGCASC government to sign energy agreements. This fact does not change the de-facto Turkish rule in the northern part of Cyprus (Republic of Türkiye Ministry of Foreign Affairs, Cyprus Historical Overview).

TGCASC signed various energy agreements with other states and private energy corporations, hence Türkiye and the TRNC stated that Greece and TGCASC violated EEZ rights and maritime jurisdiction of the TRNC. TGCASC, backed by the EU ignored all complaints by Turkish side and continued their actions in the Eastern Mediterranean. Core political challenge in the region remains unsolved even today. Instability and insecurity caused by such political tensions prevent vast exploratory actions.

The civil wars in Libya and Syria also significantly affected energy security in the region. All of these crises affected the entire region, and the littoral states suffered

the consequences, even as they continue to challenge each other. The existence of external actors in Syria and Libya adds to the already existing problems.

3.5.2. Geographical Challenges

The Eastern Mediterranean is a strategic region that faces several challenges. Global warming, lack of access to clean water, massive waves of irregular migration, terrorist activities, and the distortion of demographics due to conflicts and civil wars are the geographical challenges of the region.

Because the region sits in the middle of one of the richest hydrocarbon deposits in the world, it attracts a lot of attention. Although this attraction draws many energy companies, the difficulties in building infrastructure due to the natural nature of the region make investment very costly.

3.5.3. Legal Challenges

The production and export of natural gas encounters numerous commercial, technical, geopolitical, and legal challenges. The general principles of international law governing the exploration and exploitation of natural gas and the delimitation of maritime territories are set forth in the relevant provisions of UNCLOS 1982 (Stanic and Karbuz, 2020: 23).

Littoral states are not required to be part of UNCLOS but are still required to follow UNCLOS rules to avoid violating international law. Israel, Syria, and Türkiye are not part of the agreement, but must still abide by the prescribed principles.

Figure 18: International Law Maritime Jurisdictions in the Eastern Mediterranean



Source: Yeni Safak (2020)

The overall maritime jurisdiction and EEZs of the littoral states are shown in Figure 18. Further details on the policies and positions of the littoral states are provided in the next sections of the study.

3.5.4. Military Challenges

The presence of external actors in the region only leads to more instability in the region. The U.S. and Russia want to have a presence in the region, which is why their Syria policies clash (Pedro and Stein, 2022: 12). Russian influence in Syria is more dominant, and the use of Syrian seaports as military bases helps the Russians gain control of the Eastern Mediterranean.

The never-ending Israeli-Lebanese disputes also create instability around the Karish natural gas field. Threats of terrorist activity in the region cripple production, resulting in repeated military interventions and clashes.

Turkiye, Europe, the USA, and Russia are also present on Libyan soil. Upon the GNA's request, the Turkish military presence helped the GNA maintain its security. The presence of Russian private military contractors in Libya and Syria, more specifically the Wagner Group, has led to chaos as their name has been associated with various war crimes and violations of the principles of the Geneva Convention. There can be three reasons why a person is a mercenary in such organizations. First, to satisfy financial needs with a good salary; second, to be forced by the government or other actors to do wet work for their interests; and third, to satisfy criminal activities without facing any legal consequences in foreign countries. Whatever the reason, the chaos caused by such groups only poses a challenge that leads to instability in the region.

Lack of collective security, ongoing civil wars, and maritime disputes that escalate into hot conflicts affect regional security and thus pose a military challenge. The instability created by such events creates energy insecurity in the region and thus directly affects research and technological development in the region. All of the challenges explained in this chapter have a domino effect that is mutually reinforcing. Each action or challenge has a cost and significant impact on the energy revenues of the littoral states and brings energy production to a halt.

CHAPTER IV

ACTORS IN THE REGION

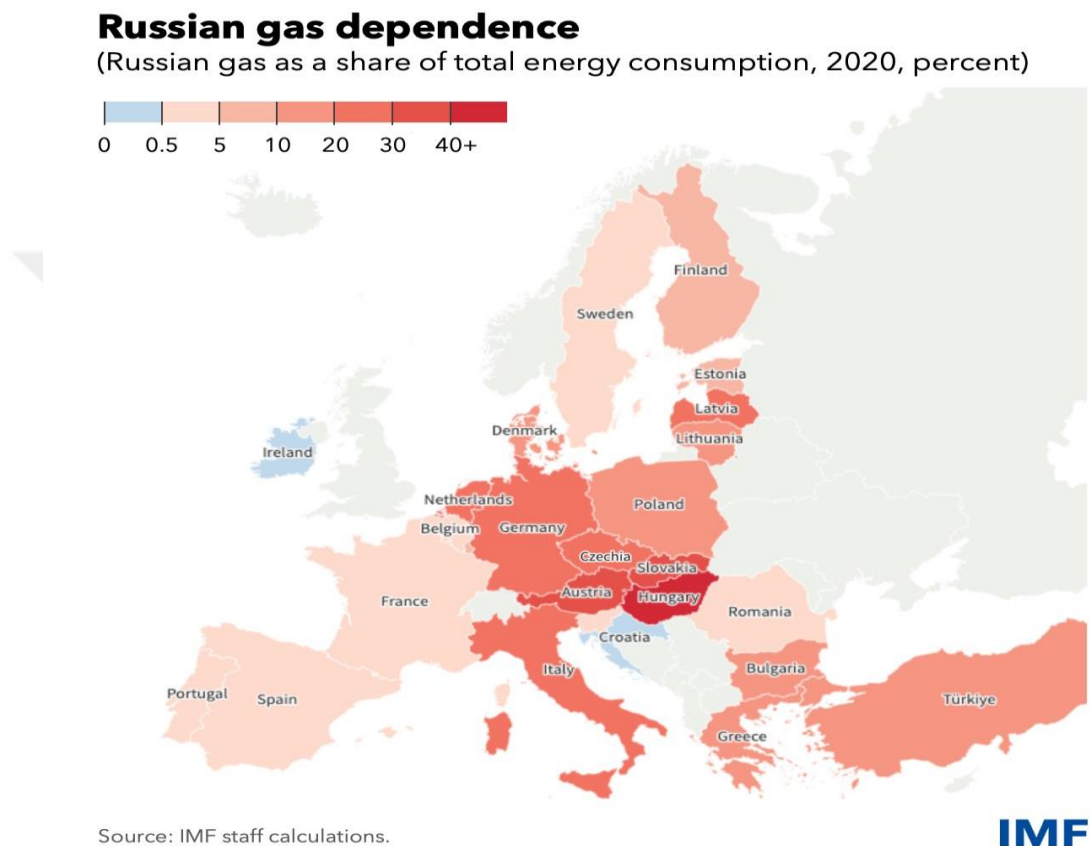
4.1. Actors and Their Policies in the Region

Emerging energy resources in the Eastern Mediterranean have forever changed the dynamics of the region. With so many developing littoral states, the discovery of energy sources near them is literally a goldmine. These circumstances lead to conflicts over access to the rich sites. Every player willing to use the newly discovered energy to meet its needs is storming the region with exploration vessels and claiming EEZs. However, some of these littoral states claimed the same EEZs because the geopolitical situation in the Eastern Mediterranean is complicated. The Cyprus issue is at the heart of this problem. In reality, Cyprus has two administrative centers, although only the northern part is recognized by Türkiye. However, even though the TRNC is unrecognized, de facto rule over the northern half of the island is a reality that individuals must face. The TRNC's unrecognized international status results in a violation of its legal maritime sovereign rights and its EEZ. As TGCASC acts as the sole owner of Cyprus, it continues its exploration missions and contracts with private energy companies. Ignoring all warnings from the TRNC and Türkiye naturally leads to an escalation of disputes and conflicts in the region. This is also the reason for the setbacks in the exploratory missions in the Eastern Mediterranean.

Competition for energy reserves is the main driving factor in the region. As wealth attracts attention, the Eastern Mediterranean has witnessed such a fate throughout history. Within the legal maritime jurisdiction and EEZ of the littoral states, external actors such as global superpowers and private energy corporations would not operate within the framework of international law without the participation of the littoral states of the Eastern Mediterranean. The key players and major stakeholders in the Eastern Mediterranean are the littoral states of the region. Due to the challenges that have arisen in the region, instability and lack of energy security have sometimes characterized the current situation in the Eastern Mediterranean. The actors and their policies are analyzed and explained in this chapter. Türkiye, Greece, TGCASC, Israel, Egypt, Libya, Syria, Lebanon, and the TRNC are the littoral states discussed in this final chapter.

Apart from the claims of the Eastern Mediterranean littoral states to their EEZs, dependence on Russian gas remains high despite the ongoing war in Ukraine. The EU and the rest of the world are primarily concerned with reducing their dependence on Russian hydrocarbon resources or, if they have the opportunity, ending it altogether.

Figure 19: Russian Gas Dependence



Source: IMF (2022)

In the past, Russia has twice disrupted the flow of natural gas to Europe, in 2005-06 (BBC News, 2006) and 2008-09 (Upstream, 2008). Russia exploits this vulnerability to the end (Flanagan et al., 2022). This has led the EU to look for alternative energy sources. Renewable energy sources could not meet expected demand, and nuclear energy was deemed dangerous yet continued to be used, while hydrocarbon energy remained irreplaceable. The energy insecurity caused by Russia prompted countries to take precautions and look for alternatives in the interest of energy security.

4.1.1. Turkiye

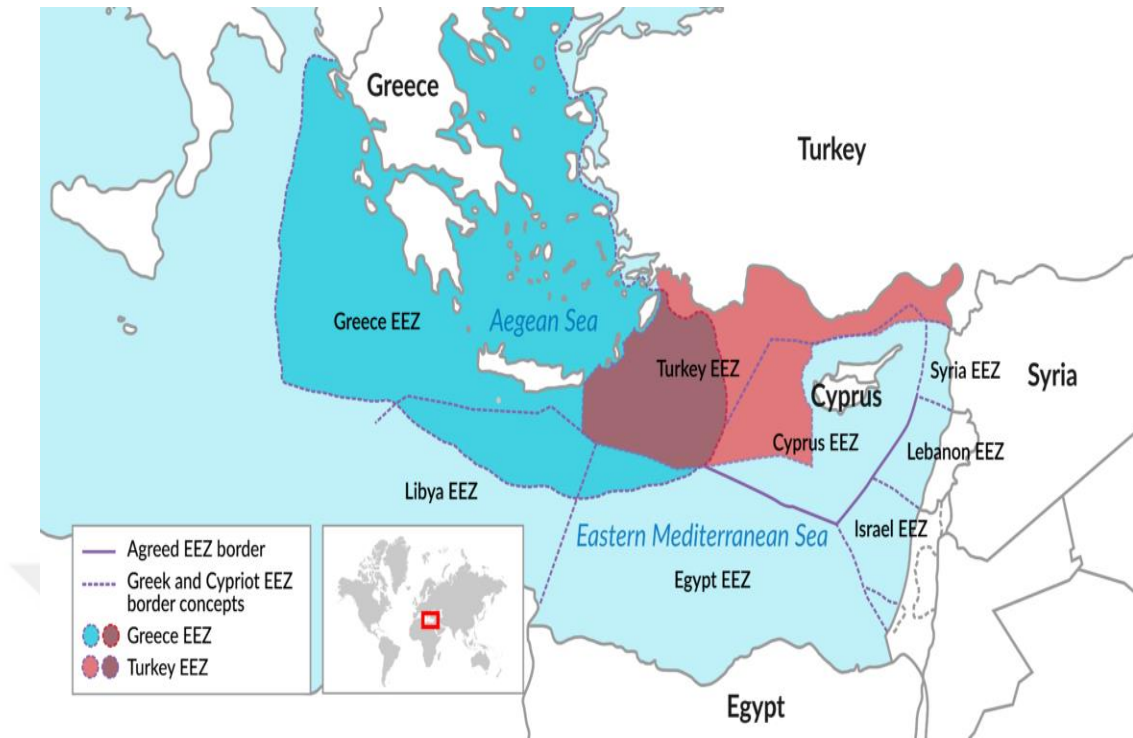
The right to conduct exploratory missions in the Eastern Mediterranean has been controversial since the beginning of this decade. With the signing of a maritime agreement with the Libyan government in Tripoli in 2020 in return for EMGF, which includes Greece, TGCASC, Israel, and Egypt, Turkish vessels were dispatched to explore hydrocarbon energy reserves in the Eastern Mediterranean. The Turkish continental shelf is contested repeatedly by Greece and TGCASC. In response to such confrontations, Turkiye fights for its rightful maritime jurisdiction and EEZ within the limits of international law.

Due to Turkiye's conflicting regional interests with other littoral states, it was excluded from the East Med Gas Forum, forcing it to go it alone in the region against the EU and other littoral states. With developing countries in need of energy, Turkiye sought allies in the region and signed an agreement with the pro-Turkiye Libyan faction to compete against other littoral states that excluded Turkiye (Kaleshar, 2020).

TGCASC and Israel are teaming up to take Turkiye and the TRNC out of the picture. The countries mentioned in the last sentence already have serious problems with each other, and the current crisis in the energy areas only exacerbates this situation. Simply put, disrupting peace and coherence in the region through wars of profit could lead to a major security breach, and the area could fall under the control of proxy or terrorist organizations. If collective security and cooperation regarding the territories cannot be achieved, control by undesirable actors in the region is inevitable.

Since only Turkiye recognizes the TRNC as a legitimate state, the EEZs and maritime areas are repeatedly violated by Israel, TGCASC, and Egypt. With neither side attempting to defuse this crisis, diplomatic clashes continue to occur.

Figure 20: EEZ Claimed by Turkiye



Source: GIS (2020)

If Turkiye succeeds in amicably resolving the disputes with the littoral states, it can play a more active role in the Eastern Mediterranean without being excluded by other actors in the region. It is understandable that the EU protects the rights of its member countries (Greece and TGCASC) but pushing away a major player in the region could backfire terribly. Turkiye's position is limited, but a quick change in foreign policy could benefit all players in the region. Turkiye's blue homeland doctrine is strongly contested by Greece, TGCASC, and the EU, as the interests of both factions clash on this issue.

Figure 21: Blue Homeland Coverage Zone



Source: TRT World (2020)

The intended Turkish EEZ is shown in Figure 20 and the Blue Homeland doctrine in Figure 21. Greece vehemently denies the Turkish claims. However, the EEZ is secured by UNCLOS 1982 and is practiced as such. Türkiye's Blue Homeland doctrine is based on these principles and aims to ensure the protection of its own maritime zone without relying on any other actor (TRT World, 2020). It appears that the Turks have no intention of deviating from their current position, and it shows that there will be no reconciliation in the near future. Each state understandably lays claim to more maritime territory for its own benefits. As long as the littoral states do not reach an agreement, Türkiye and Greece, which are allies of NATO, will continue to have disputes, which will lead to instability and insecurity in the Eastern Mediterranean.

Türkiye refused to recognize the agreements signed between Egypt and TGCASC in 2004 and between Lebanon and TGCASC in 2007, claiming to reserve all rights west of the meridian D 32° 16' 18", thus taking a strong position (TRT World, 2020). The current political problems, the problems with maritime jurisdiction and the transportation of energy reserves in Cyprus can only be solved if the conflict can be resolved in favor of both sides.

Of course, the TRNC does not recognize an EEZ agreement concluded by TGCASC with other countries, since it constitutes half of the island and cannot represent the entire island alone when two actors are present. When TGCASC signed an agreement with the American company Noble Energy in 2011, it tried to claim all the profits for itself. The TRNC rightly demanded a fifty percent share of the profits, but TGCASC ignored this demand and granted Noble Energy permission to drill in Cyprus' EEZ. The TTNC claimed that its rights were violated by TGCASC and that this violated international law. Shortly thereafter, the TRNC and Türkiye signed a Continental Shelf Agreement to address this grievance. Of course, that did not stop Noble Energy from investing in Cyprus, and later the Delek Group and eventually some other companies. The TRNC's de facto status will continue to hurt the region unless Türkiye and the TRNC find a way for the world to recognize it as an independent nation. An individual TRNC agreement with a state other than Türkiye may be a good way to start. Eventually, the littoral states will recognize the importance of Türkiye and the TRNC in the region.

Developments in the eastern Mediterranean show that there are disagreements about maritime jurisdiction that can only be resolved by delimiting maritime territories. There are certain rules for the delimitation of maritime jurisdiction. Under international law, a country's maritime jurisdiction is delimited by territorial waters, fishing grounds, contiguous zone, continental shelf, and exclusive economic zone. The aforementioned terms serve only to help a country defend its sovereignty, maintain its security, and control ongoing actions within its territory. Technological progress and the dramatic decline of energy sources have shifted the search to the seas. Developments in the eastern Mediterranean show that there are disagreements about maritime jurisdiction that can only be resolved by delimiting maritime territories. There are certain rules for the delimitation of maritime jurisdiction. Under international law, a country's maritime jurisdiction is delimited by territorial waters, fishing grounds, contiguous zone, continental shelf, and exclusive economic zone. The aforementioned terms serve only to help a country defend its sovereignty, maintain its security, and control ongoing actions within its territory. Technological progress and the dramatic decline of energy sources have shifted the search to the seas.

Two terms – the continental shelf and exclusive economic zone were first mentioned by U.S. President Harry Truman in the Truman Doctrine on September 28, 1945, in order to explain USA's economic interests and legal rights in the seas. The

terms were officially incorporated into the text of UNCLOS in 1982. In the context of the Eastern Mediterranean, the EEZ is delineated by a 200-mile area following the end of a country's territorial waters. It allows a country to drill wells and use various other ways to exploit the water layer, the seabed, and the underlying area (Pazarci, 2012: 286). The littoral countries have the right to do anything in this area.

In this context, the recent discoveries in the Eastern Mediterranean Sea have further fueled disputes between these countries, as the EEZ and maritime jurisdiction are unclear. Türkiye calls for resolving such disputes within the legal principles of international law without giving up its rights, in cooperation with all stakeholders. While the discovery of energy resources leads to non-violent conflicts in the region, it increases tensions in the Eastern Mediterranean.

4.1.2. Greece

The EEZ claimed by Greece under UNCLOS 1982 covers more than five hundred thousand square kilometers, including the Greek islands in the Mediterranean and Aegean Seas. However, the continental shelf of the Greek islands is disputed by Türkiye, i.e., Türkiye does not legally recognize the EEZ of these islands. Greece's foreign policy towards Türkiye shows disagreement in the region. Israel recognized the EEZs of TGCASC and Greece, pioneering a natural gas agreement with Noble Energy to export gas from the Leviathan to the EU energy markets.

Figure 22: EEZ Claimed by Greece



Source: TRT World (2020)

Greece also signed the energy agreements with Egypt and Italy, to secure EEZs and ensure a safe route for natural gas transportation from the Eastern Mediterranean to the EU energy markets (Reuters, 2020).

Three factors shape the Turkish-Greek maritime conflict: Disagreements on territorial waters in the Aegean and the Mediterranean; disagreements of EEZs and Cyprus Question (Dalay, 2021).

From the Greek perspective, the Turkish claims constitute a violation of Greece's maritime territorial integrity, so the "just war" theory is applicable. Neither side would accept the EEZ or maritime claims of the other. To make matters worse, rising tensions in the Eastern Mediterranean have escalated into a dispute between Türkiye and the TRNC against Greece, TGCASC, Egypt, France, Italy, and the United Arab Emirates.

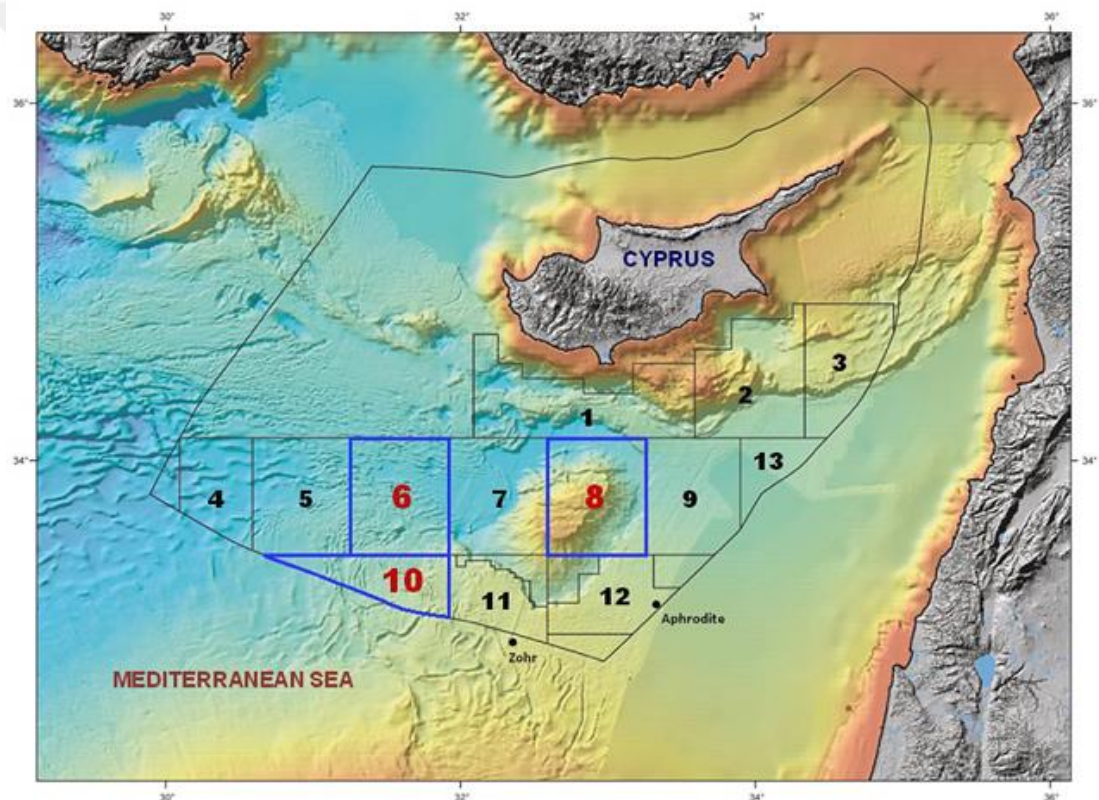
The discovery of new hydrocarbon deposits in the Eastern Mediterranean sparked disputes as tensions came to a head. With support from the EU and the West, Greece is securing more maritime territory through TGCASC and signing more energy

agreements with both littoral states and external players, private energy companies. Historical rivalry does not seem to allow Greece and Türkiye to work together, although both sides can benefit from energy reserves if they do not just claim them for themselves.

4.1.3. The Greek Cypriot Administration of Southern Cyprus

TGCASC aspires to be a major player in terms of energy trade, so its claimed EEZ contains a large share of potentially rich gas deposits. Its claim to twelve blocks is disputed by the TRNC and Turkish governments.

Figure 23: Twelve blocks that claimed by TGCASC



Source: Greek Reporter (2022)

Blocks 6, 8, and 10 are marked to show that private energy companies such as Total and Eni have licensing agreements with TGCASC and Greece. Block 7 in particular is controversial, as Türkiye also claims part of the block as its own EEZ. In 2020, Greek Foreign Minister Nikos Dendias told a press conference that the EU would impose a list of sanctions on Türkiye because of its aggressiveness. As a result, the Turkish research vessel Oruc Reis had to withdraw from the area, yet Türkiye sent

several drilling vessels to Block 7 to defend the legal maritime rights of the country and the TRNC. These sanctions impacted the Turkish economy, although the EU views Turkish interests in the region as hostile and seeks to defend its territory by challenging Turkiye.

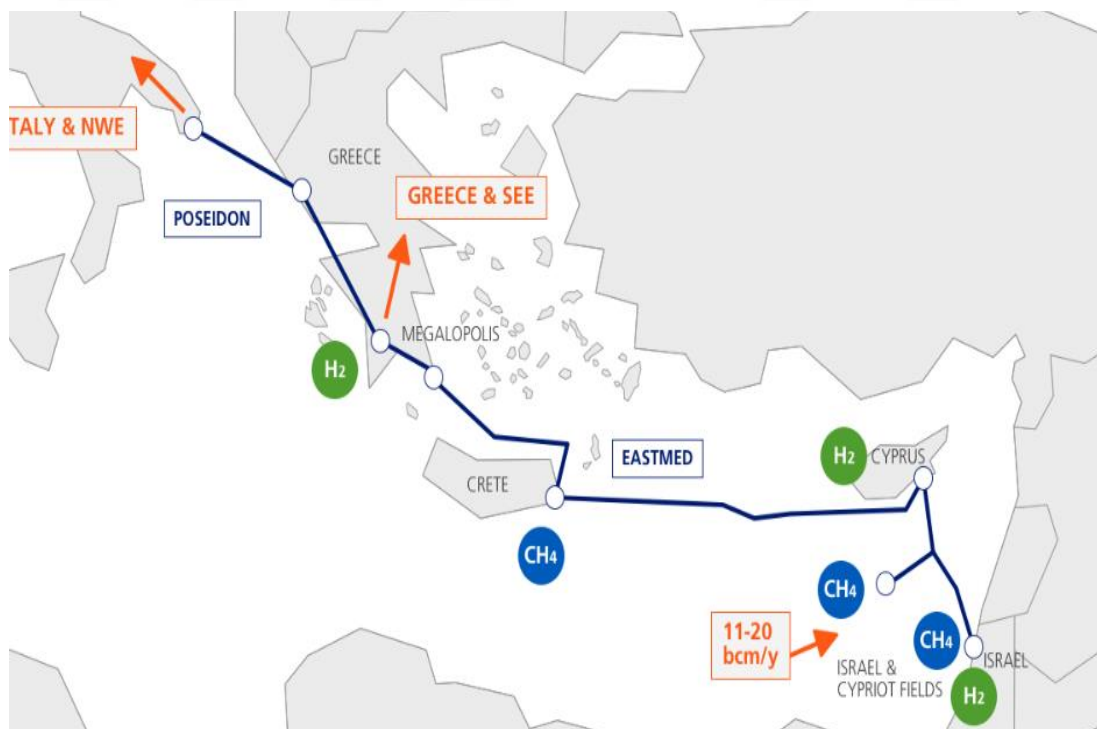
TGCASC approach to this disagreement with Turkiye and the TRNC to use all the EU means to defend a member state against hostilities by a non-member state. Obviously, such hostilities lead to instability in the region.

The Turkish claims of EEZ of Cyprus, which is under maritime jurisdiction of the TRNC, however, since it is an unrecognized state, TGCASC recognizes this as a violation of territorial integrity by Turkiye, thus, protests it in the international area (Keep Talking Greece, 2019).

4.1.4. Israel

Israel has one of the wealthiest blocks within their EEZ hence willing to be a major energy exporter in the region. The Poseidon Pipeline project is their way of transporting gas directly from Israel to Europe via Greece.

Figure 24: EastMed Poseidon Pipeline



Source: Edison (2022)

The length of the Poseidon Pipeline is roughly 2000 kilometers long and its transport capacity is 11 to 20 BCM in a year. It is planned to connect the Levant Basin directly to EU markets. It is estimated that production in the Israeli gas fields will be increased by extra 20 BCM per year by 2027. Construction of the pipeline is vital for TGCASC due to the facilitation of the development of their energy reserves. As it is seen in the Figure 24, gas transportation to Central and Western Europe will be accessible from Italy and to Balkans and the Eastern Europe from Greece.

There was a dispute between Israel and Lebanon over the EEZ, in which Israel disputed the Lebanese government's claims (Schmoll, 2017: 79-80). Despite the Lebanese attempts to declare its southern EEZ boundary at UN, Israel challenges the Lebanese claims both legally and cartographically and dictates its own maritime EEZ boundaries.

Figure 25: Disputed Lebanese-Israeli EEZ Border



Source: Econostrum (2019)

Area 4 in the Figure 25 is a disputable area, where Israel and Lebanon are unable to compromise. Israel intends to do exploratory research in the area, however, Lebanon objects this intend and defend their legal rights of maritime borders within the framework of international area. The locations of Israeli hydrocarbon energy reserves and areas under the control of Israel within the framework of the international maritime agreements or cooperation zones with other littoral states are shown in the Figure 25. The data about the amount of energy reserves are shown in the Table 3.

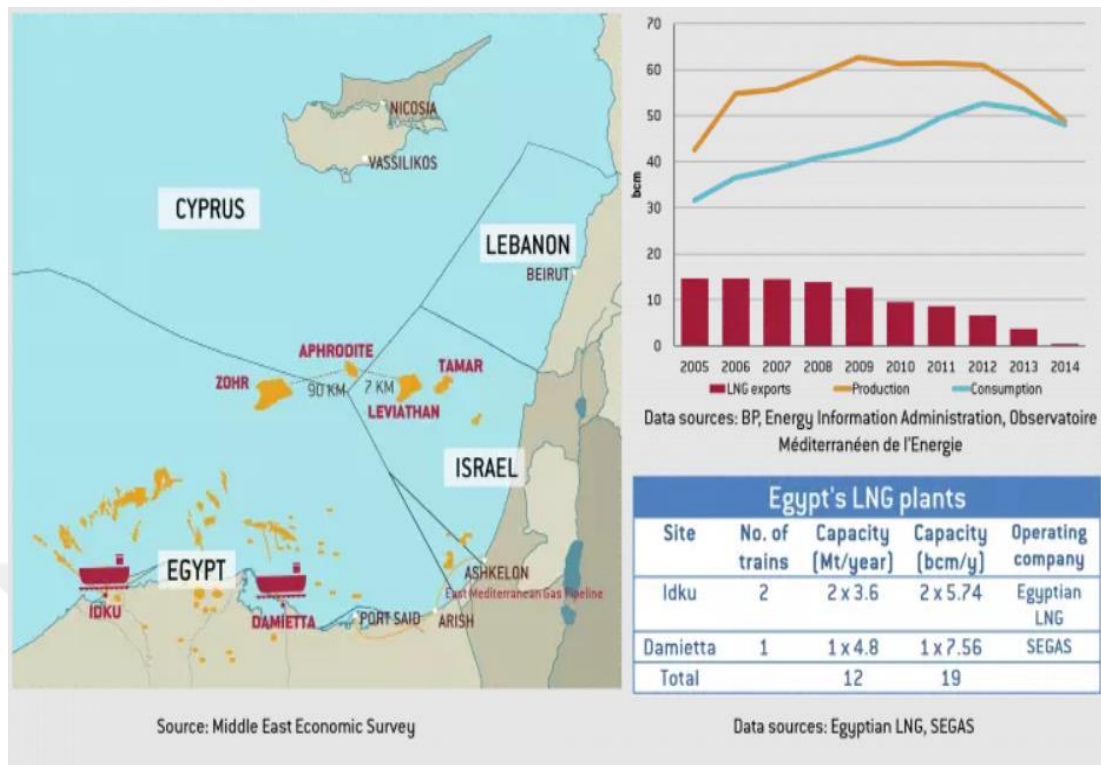
Israel aimed to export energy via the Karish natural gas field, which is relatively a tiny field. It would meet 10 per cent of the EU's energy demand that is unmet due to the ongoing Russo-Ukrainian War (Econostrum, 2019). Systematic exploratory missions of Israel and cooperation with other littoral states such as Egypt, Greece, and TGCASC work well and their advancement in the region in terms of supplying domestic demands is boosting their requirements, making them less foreign-dependent as intended from their point of view. Israel aims to have general control of energy reserves in the Eastern Mediterranean alongside Egypt, thus, a cooperation with Turkiye does not exist.

4.1.5. Egypt

Egypt has the most significant amount of hydrocarbon energy reserves in the Eastern Mediterranean. The Zohr energy field that discovered by Egypt within their claimed EEZ offshore in 2015 contains approximately 850 BCM of natural gas which makes the largest discovery in the Eastern Mediterranean so far. This discovery shaped current regional gas outlook in terms of shifting energy corridor from north to south.

Table 1, Table 2, and Table 3 demonstrate the amount of energy reserves Egypt possesses in the region. Egypt's hydrocarbon energy focus is available in Figure 26.

Figure 26: Egypt's Hydrocarbon Energy Focus



Source: Bruegel (2015)

Since the Zohr field is under maritime jurisdiction of Egypt, it will primarily supply domestic gas demand of the country. As the region is developing, Egypt needs the significant amounts of energy. Before this discovery, Egypt struggled to meet domestic demands. However, the reserves of the Zohr field exceed the domestic demands of Egypt. Thus, the remaining amounts can be exported and create an energy income for it. Location of the Zohr energy reserves is only 90 kilometers of southwest of the Aphrodite and 97 kilometers away from the Leviathan (Zachmann and Tagliapietra, 2015). An energy cooperation between Egypt, Israel, Greece, and TGCASC allows them to have an opportunity to export gas to Europe via the Vasilikos project of TGCASC. Although Türkiye and the TRNC heavily contest such projects, the EU supports such a cooperation of Egypt with Israel, Greece, and TGCASC.

Turning the Eastern Mediterranean into a massive energy hub would be in favor of all sides. However, the foreign policy of Egypt as much as domestic politics will determine how this sector could be beneficial for it. Egypt expects the EU to support the country with financial investments and provide energy security for a long-term energy partnership to meet the energy needs of the EU energy market; so far, the

cooperation has been mutually beneficial. Egypt has the richest energy reserves in the Eastern Mediterranean (Bruegel, 2015).

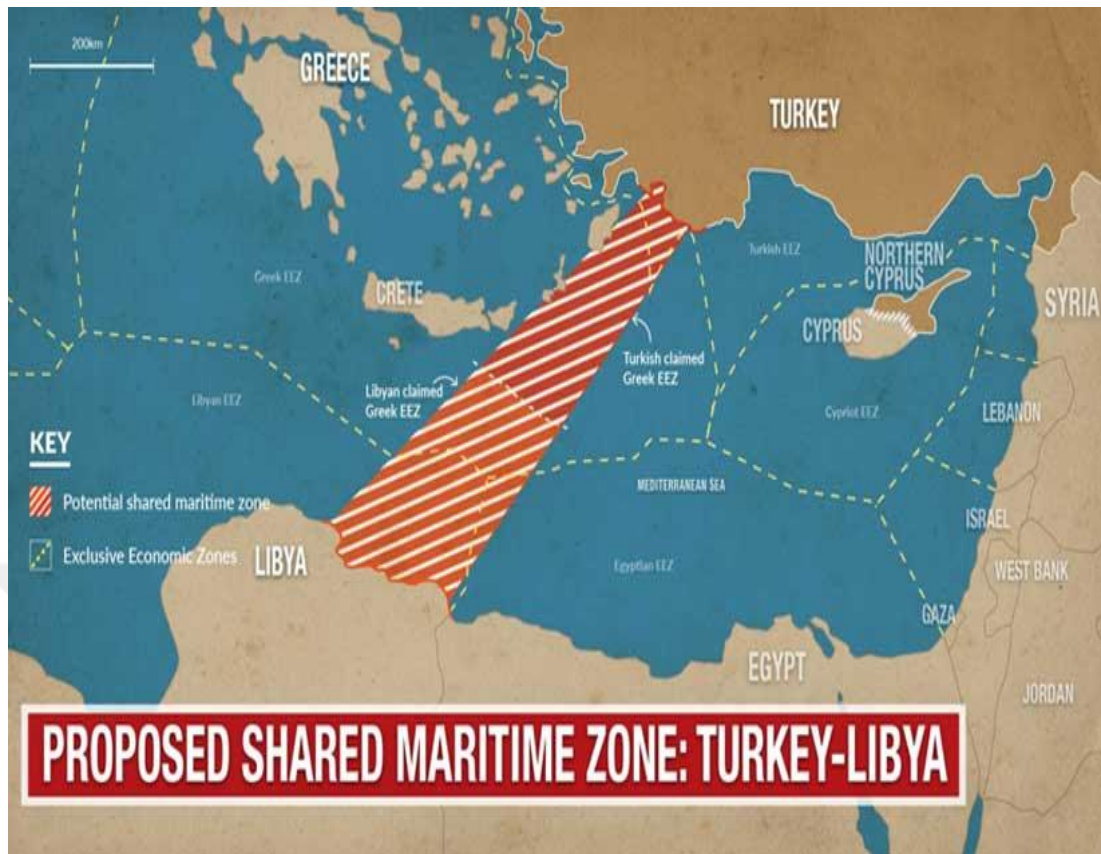
The Arab Spring led an unstoppable series of revolutions in the Middle East and North Africa. ISIS control in Iraq and Syria, successful military coup d'état in Egypt demonstrated clearly that the region will be always vulnerable to variables. Thus, a collective security is the most important priority in the Eastern Mediterranean. Energy transmission lines from the Middle East to Europe are present in the Eastern Mediterranean and energy reserves lie beneath it. That obviously draw a lot of attention, especially major global actors.

4.1.6. Libya

Libya is one of the most significant littoral states in the Eastern Mediterranean. Against the coalition of Israel, Egypt, Greece, and TGCASC in the region, GNA and Turkiye signed an agreement on 27 November 2019 delimiting each other's respective maritime EEZ (Tur, 2019). However, EEZs declared within the mentioned agreement are also claimed by TGCASC, Israel, and Egypt. The Greek Cypriots reflect this incident as a violation of international law and to their respective EEZ.

Maritime cooperation between Turkiye and GNA led by al-Sarraj signed a memorandum to make official their cooperation in the Eastern Mediterranean. This memorandum was challenged by Egypt, Israel, Greece, and TGCASC for violating their claimed EEZs. Turkish investment in Libya is not new. Even when Gaddafi ruled Libya, Turkish energy companies were present and invested up to 26 million USD (Valori, 2019). Since there was a civil war, upon the request of GNA, the Turkish military troops were present in Libya.

Figure 27: Shared EEZ between Turkiye and Libya



Source: Modern Diplomacy (2019)

Turkiye and Libya encountered the agreements signed by TGCSAS, Greece, and Israel. Ankara already stated that excluding Turkiye, the TRNC, and other littoral states from a delimitation agreement is unacceptable (Republic of Turkiye Ministry of Foreign Affairs, 2010). The close ties between Libya and Turkiye created an opportunity for cooperation. Libya has the largest oil reserves among OPEC countries (OPEC, 2021), and in the near future, natural gas will be added onto energy trade.

Table 4: Hydrocarbon Reserves Data of Libya

Terms	Numeric Values
Exports (Million USD)	28,986
Petroleum Exports (Million USD)	27,485
Proven Crude Oil Reserves (Million Barrels)	48,363
Proven Natural Gas Reserves (Billion cu. m.)	1,505
Crude Oil Production (1000 b/cd)	1,207
Marketed Production of Natural Gas	24,244

Refinery Capacity (1000 b/cd)	634
Output of Petroleum Products (1000 b/d)	126
Oil Demand (1000 b/d)	186
Crude Oil Exports (1000 b/d)	1,091
Exports of Petroleum Products (1000 b/d)	89
Natural Gas Exports (Million cu. m.)	8,000

Source: OPEC (2021)

Libya is ranked first in terms of production of 48,363 million barrels of oil among African states. Turkish longa manus within Libya is a significant strategic move in terms of a fruitful strategic partnership between Türkiye and Libya, this also limits continental shelf of Greek EEZ offshore Athens. It means mainland Greece is no longer have access to Crete, Cyprus, Rhodes, and all other small islands in the Eastern Mediterranean. That memorandum costed Greece and TGCASC since maritime boundaries of Cyrenaica extends to offshore Mugla and Antalya. Turkish support to Libya allowed both factions to develop excellent relations between them and that led to energy cooperation, which both states will benefit.

4.1.7. Syria

The Syrian civil war that started in 2011 (Al Jazeera, 2018) attracted various terrorist groups and foreign states such as Russia, the USA, Türkiye, and the EU faction to the region. The instability in Syria forced them to leave their EEZ claims in the Eastern Mediterranean unsupported. Since all the forces within the state interacted, they needed the actors outside the region to enforce maritime jurisdiction for them, for a fee, of course. Intense Russian influence in Syria deliberately made it an actor in the region. Hydrocarbon reserves in the Eastern Mediterranean within the EEZ of Syria is crucial for Russia. With each new discovery, the region's energy reserves became more significant, providing an alternative to Russian natural gas. The Shiite sect, which has a crucial importance in the region, also extends from there. The religion factor is crucial when seeking control over a region, which Russia has done with great skill for many years. The USA aimed to resolve civil war in advance to their interests, however, regime of Bashar al-Assad found more comfort with Russian presence, limiting the US influence in Syria (Alterman and Conley, 2018: 1).

The long coastline of Syria (Figure 28) offers many access points to the Eastern Mediterranean, which allows to export any hydrocarbon-based product.

Figure 28: EEZ Claimed by Syria



Source: Researchgate (2015)

Russians have taken the control of Tartus, which is a significant port, Latakia air base and a listening station near Latakia and by that, Russia has been working on restoring approximately 40 energy facilities within Syria (Watkins, 2020). With reserves around 8.5 TCF of natural gas, the Syrian share in the Levantine Basin Province is approximately 6.5 per cent and location also contains approximately 1.7 billion barrels of recoverable oil (USGS, 2010). Syria cannot be left idle; thus, no

external actor allows that to happen, however, Russia still has the most influence and control in the country.

Although Damascus attempted to do exploratory search with domestic energy corporations, Soyuzneftegaz, a Russian state-sponsored private energy corporation signed nearly all energy deals, by which Syria lost control of its energy reserves within their maritime jurisdiction (Al-Saled et al., 2021).

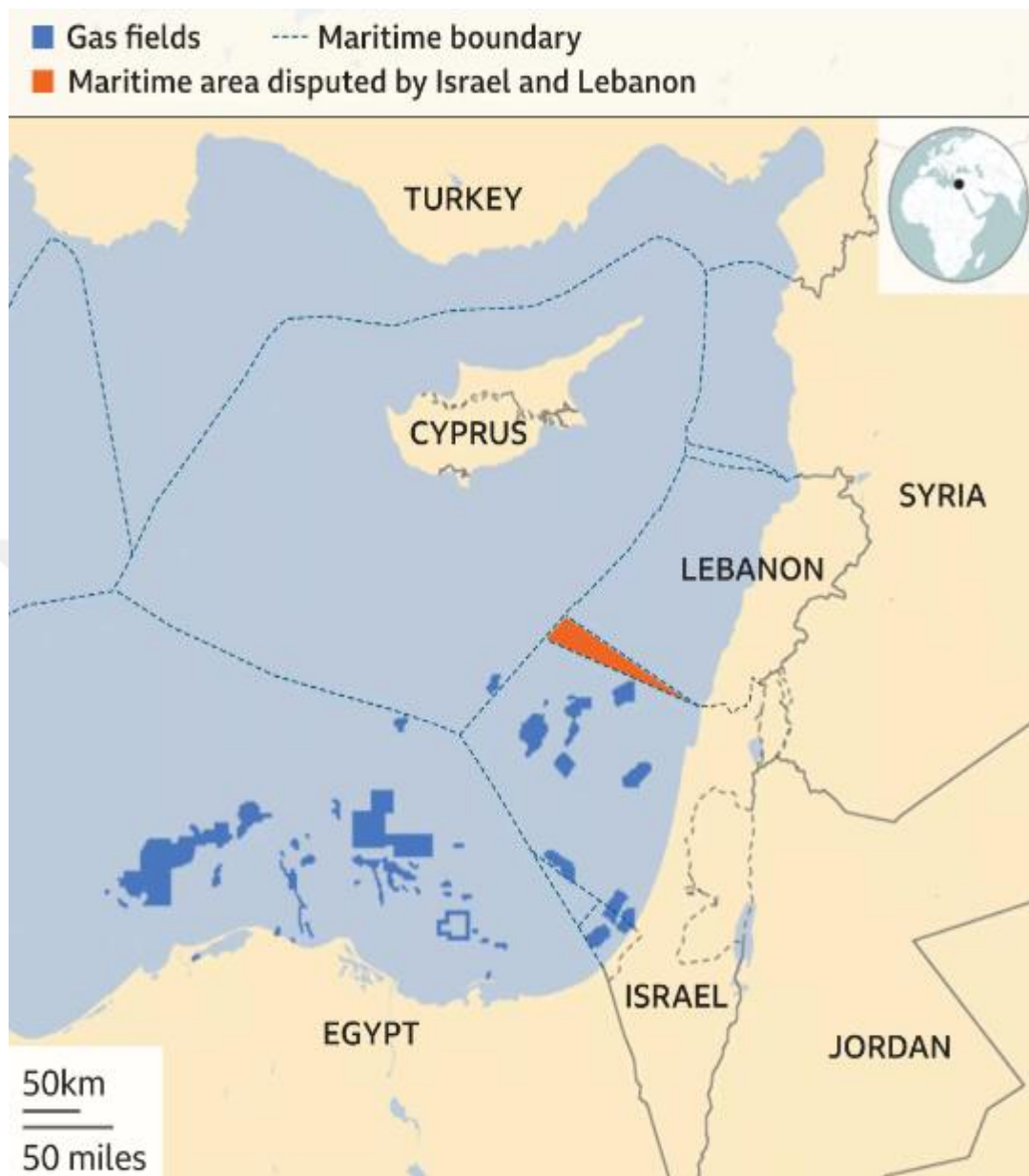
4.1.8. Lebanon

The EU complains about energy prices. It needs cheaper alternatives, so the disputes in the Eastern Mediterranean are crucial for it, as any disagreement costs it time, energy, and money. The Karish natural gas field, located in the disputed maritime area between Israel and Lebanon, causes a lack of energy security (Knell, 2022).

Lebanon suffered an economic crisis due to energy shortages, which occurred in late 2022 and led to extended exploratory missions in the energy sector. In its desperation, Lebanon wants to exploit the hydrocarbon reserves of Qana, but this maritime territory is also in the disputed area.

Neither side is willing to withdraw from the area, as both sides view the other as a strategic security threat to their claimed EEZ and maritime jurisdiction. Israel and Lebanon's past is complicated. In the 74 years since Israel's founding, there have been numerous Arab-Israeli wars, and Lebanon has always been a member of the Arab League. Such a shared history is obviously not helpful for negotiations under peaceful conditions. Not even external actors have succeeded in defusing the dispute between these two parties.

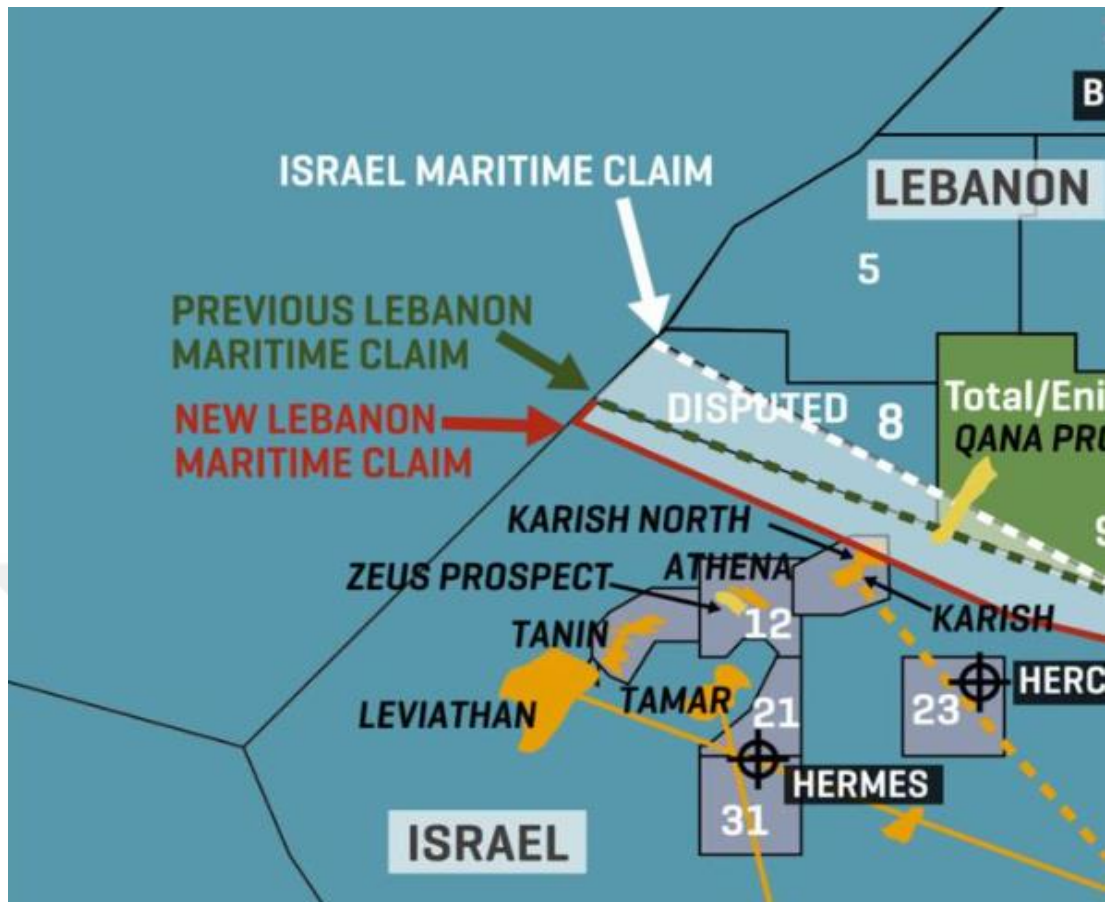
Figure 29: Israel-Lebanon Maritime Disputed Area



Source: BBC News (2022)

Increasing energy insecurity due to terror threats against the Karish natural gas field operating in the disputed area has put Israeli security officials on notice. Despite smaller reserves and production capacity than the Tamar and Leviathan gas fields, the Karish gas field has attracted more attention than the latter two because the Karish gas field is located within the disputed maritime area (Henderson et al., 2022). Discovery of the Karish North gave birth to another dispute on the EEZ between these two parties.

Figure 30: Shifts in the Maritime Claims Between Israel and Lebanon



Source: MEES (2022)

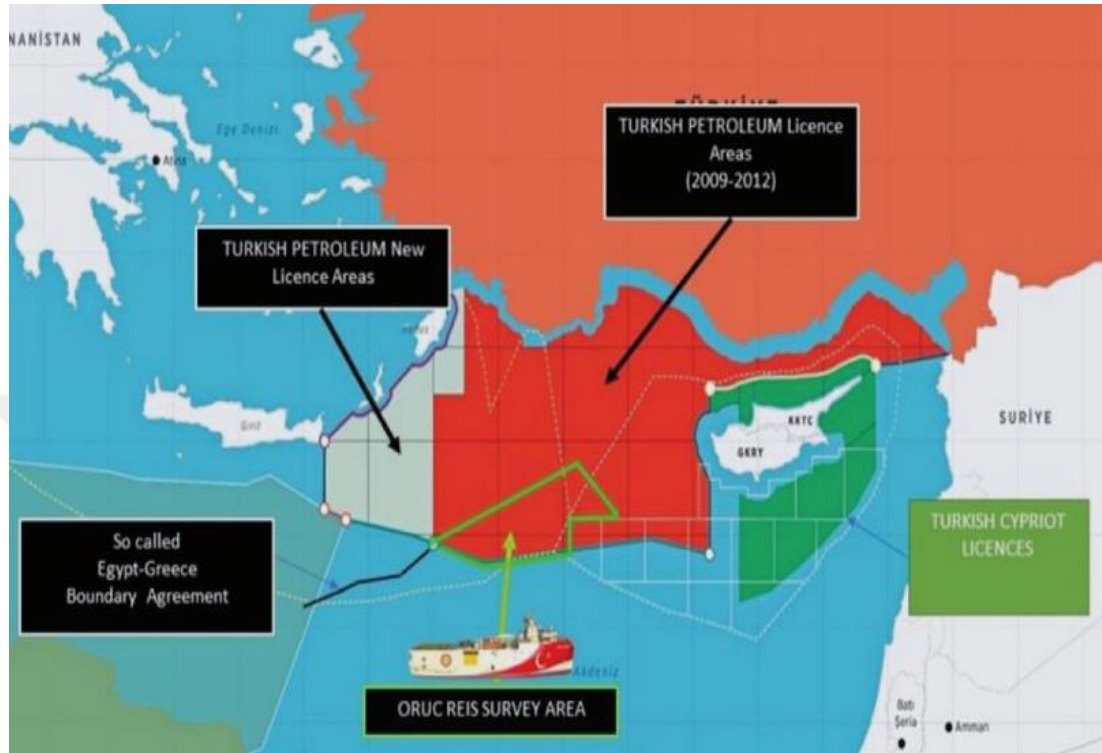
Lebanon has extended its claims further into the Israeli EEZ. Energy operator Energean is eager to produce natural gas from its 2.6 TCF reserves, but pressure from the U.S. indicates that the Karish natural gas field may not come on line in time and the process may be delayed due to the unresolved dispute between Israel and Lebanon (Stevenson, 2022). It appears that this dispute may continue for some time, and in the meantime, these setbacks will cripple the energy efficiency of the region and the world.

4.1.9. Turkish Republic of Northern Cyprus

The TRNC is like an extension of Türkiye, since Cyprus is recognized de jure as a single nation ruled by Greek Cypriots, but in reality, the northern part is ruled de facto by Turkish Cypriots. This fact is often neglected, which is why the TRNC is ignored in every single international agreement. Only Türkiye recognizes the TRNC as a nation state and defends the rights of Turkish Cypriots by all necessary means.

That is the core reason of the violation of EEZ of the TRNC by TGCASC, Greece, Israel, and Egypt.

Figure 31: TRNC EEZ License Maritime Areas



Source: Anadolu Agency with Data from Republic of Türkiye Ministry of Foreign Affairs (2020)

TGCASC intends to represent the entire island, but this is impossible given the decades-long embargoes against the TRNC. Moreover, the Turkish Cypriots cannot trust the Greek Cypriot administration to defend their rights or ensure their security (Olgun, date accessed: 03/01/2023). Trust is crucial in a peaceful region, but this does not seem to be the case in the near future.

Greece and TGCASC enter into individual agreements with Israel, Lebanon, and Egypt in an attempt to isolate Türkiye in its own seas and eliminate it as a competitor. On the other hand, TGCASC acts as the Republic of Cyprus and concludes its agreements as if the island had a unitary status. Although the Republic of Cyprus is the official name of TGCASC, the Greek Cypriots have no control over the northern part of the island. The Northern Cyprus is de facto ruled by the TRNC, since the only country that recognizes it as an independent nation is Türkiye.

Despite all this, TGCASC has acted and made agreements that ignore this fact. Most countries carefully avoid the TRNC so as not to recognize it as an independent nation and negatively shape their contacts and relations in the Eastern Mediterranean with TGCASC and Israel. This is because an agreement with the TRNC would mean that it is indeed an independent nation, even if it does not make an official statement declaring it so. For this reason, TGCASC acts strictly like the Republic of Cyprus, but only looks out for the interests of the southern part and violates the rights of the TRNC.

Without diplomatic missions to convince the world to recognize the nationality status of the TRNC, no state will respect the borders, maritime jurisdiction, or EEZ of the Turkish Cypriots. The lack of legal recognition is the main reason why no private company offers contracts except Turkish companies from Türkiye. No state is willing to unintentionally recognize the TRNC as a de jure authority. Such an action would damage the international reputation of Greece and TGCASC, which the EU would never accept if member states were to incur such a penalty. The EU's entire energy supply in the Eastern Mediterranean is in the hands of Greece and TGCASC, which they would never put at risk at any price.

CONCLUSION

The lack of collective energy security is at the root of almost all challenges in the Eastern Mediterranean. As can be seen, there is more than one actor making territorial claims. Long before the discovery of hydrocarbons, the interests of the littoral states collided, as there are historical rivalries in the Eastern Mediterranean. The discoveries of oil and natural gas added another dimension to these challenges. As a result, relations between the littoral states are more complicated than ever. The geopolitical and geostrategic interests of the littoral states have reached a point that makes compromise almost impossible. All of these littoral states rely either on energy or on energy revenues from the export of natural gas or oil. Not only are the littoral states competing for more hydrocarbon energy resources, but they are also drawing global attention to the region. The Eastern Mediterranean is poised to become one of the world's most important gas hubs. It will shape a new world.

Conflicts around the world have shown that greed knows no borders, races, religions, languages, genders, or wealth. Such threats have been nothing more than a mere demonstration of the consequences of a potential rupture in global security. As a result, tangible issues such as borders, soils, or territories turn out to be meaningless conflicts of interest. For without collective security and cooperation with other states, even the strongest states in the world cannot control these things.

To shape a better world, these actors must work together to achieve collective security if survival is their ultimate goal. The discovered hydrocarbon resources must be used for the survival and development of humanity rather than for wars and destruction. Any danger beyond human control is imminent, and it is impossible to meet such challenges individually as states.

The EU tried to gain control of Cyprus by incorporating TGCASC into the Union in 2003, and also wanted to use renewable energy such as solar panels and wind power to reduce its energy dependence on Russia. Europe's energy dependence is too great and therefore vulnerable to exploitation. It is clear that the energy corridor for hydrocarbons is shifting from north to south, creating an alternative for Russian natural gas. It is inevitable that Russia will lose its natural gas monopoly, as the Eastern Mediterranean is a great alternative to Russian gas.

Another superpower, the USA, provided security for its NATO partner Israel in the Middle East and provided diplomatic support in future disputes. However, this

changed when Lebanon extended its EEZ to Israeli maritime sovereignty and this incident crippled natural gas production from the Karish natural gas field.

On the other hand, Russia has used the port of Tartus in Syria as a military base since 1971, which has strengthened Russian influence in the region in recent years. Moscow wants a piece of the pie in the Eastern Mediterranean and has therefore increased Russian control in Syria. All of these developments impact the Eastern Mediterranean as a global player and make it indispensable in terms of security, energy, and transportation.

In the context of the littoral states, conflicts of interest in the Eastern Mediterranean began in the early 2000s. Significant amounts of hydrocarbon reserves were discovered in the south of TGCASC. It started when the news about TGCASC appeared in the Greek Cypriot and Greek press. In this context, this news heralded the dispute over maritime jurisdiction in the Eastern Mediterranean. Political tensions in the Eastern Mediterranean, conflicts of interest in the energy sector, and the Cyprus problem exacerbated this conflict, and the Eastern Mediterranean eventually became a troubled sea of conflicts over division and authority, particularly between the Greek Cypriot administration, Greece, Türkiye, the TRNC, Israel, and Egypt.

The delineation of maritime jurisdictions among the countries of the Eastern Mediterranean region led to a dispute over the EEZ, giving rise to this term. Since the TRNC is not recognized as a state, the rights of this island become the subject of the biggest dispute. In this context, regional countries have a larger piece of the pie in terms of energy to gain and expand maritime areas in the Eastern Mediterranean and actually implement exclusive economic zone policies.

Looking at the exclusive economic zones policies of the regional countries, TGCASC is proactive in this regard. With the discovery of hydrocarbon deposits off the coast in 2001, with Egypt in 2003, with Lebanon in 2007, and with Israel in 2010 through the signing of exclusive economic zone agreements, TGCASC has expanded its maritime areas in the region. However, due to Türkiye's objections, the Lebanese Assembly did not approve the agreement and Egypt had to withdraw. On the other hand, Greece and Egypt signed the "Nicosia Declaration" with TGCASC on April 29, 2015, which does not require Türkiye's approval, and announced that they will continue to establish the EEZ boundaries in the maritime areas.

The TRNC and Türkiye do not recognize TGCASC's policies or EEZs in the Eastern Mediterranean. Moreover, the TRNC is the sole representative of Cyprus and

rejects all claims of TGCASC. The TRNC is also accused of violating the international law by trying to make arrangements against TGCASC's oil and gas exploration activities. Turkiye recognizes all actions of TGCASC as hostile and will continue to defend its rights by all means. If energy cooperation were to occur in the region, it could help resolve the Cyprus issue, but this is only a hypothesis.

Cooperation between states in the region can prevent potential harm to the states involved and avert the threat of hot conflicts, if only they stop extorting the rights of other states. There are not only, but also other actors outside this region. Now that the energy resources are there, the littoral states and global players are more than interested. This makes any cooperation in the region even more important, as faraway states also want a piece of the pie. Political fights and attempts to marginalize Turkiye and the TRNC as a nation are likely to backfire and should not happen if no state in Europe is willing to accept Russia's decision to freeze them or not. In the meantime, Turkish officials obviously need to be subtle about this issue and not raise tensions further but take the opportunity to work with other states and private energy companies. The current foreign policy of littoral states and other actors is only slowing down the region's development by delaying the exploitation of hydrocarbon reserves, and unless a state paves the way for a change in policy on this issue, setbacks will hold back the region's economic development for even longer.

Politicians who have never set foot in fields where hydrocarbon energy reserves are located are fighting over who gets the largest share of hydrocarbon energy reserves, which will definitely cost lives and instability in the region. This will only lead to more conflict. Therefore, it must come to an end. Collective security is a necessity, and until it is achieved, there will always be challenges that paralyze development in the Eastern Mediterranean.

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