Reshaped After the Pandemic:
Turkish Aggression in the Eastern Mediterranean

JINSA Gemunder Center's Eastern Mediterranean Policy Project - July 2020

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Executive Summary

Earlier this month Turkish President Recep Tayyip Erdoğan boasted, not inaccurately, that his country "has become a powerful regional actor at a scale never seen in its recent history."[1] These words underscore how, amid the COVID-19 pandemic's shake-up of domestic politics and international relations across the globe, Turkey is expanding its influence in the Eastern Mediterranean and creating challenging new conditions on the ground and offshore that the United States and its partners could struggle to address.

As our group laid out in a May 2020 paper on rising instability in the Eastern Mediterranean, Turkey has become both increasingly assertive and isolated in recent years.[2] Washington's own lack of focus there has helped invite Ankara's growing aggressiveness, which in turn worsens security competition in a region that increasingly resembles the South China Sea – with Turkey more and more playing the role of China.

COVID-19 is exacerbating these problems, but the underlying trends took shape prior to the pandemic as the region experienced a deepening standoff between Turkey and most other littoral states. This relates in part to Ankara's interventionist foreign policy in support of the Muslim Brotherhood and other Islamist groups in Egypt, Syria and now Libya. But it also stems directly from the growing confrontation over exploration for presumably abundant undersea natural gas in the Eastern Mediterranean. Indeed, driven largely in reaction to Turkish policy, combinations of Egypt, Cyprus, France, Greece, Israel, Italy, Jordan and United Arab Emirates (UAE) are developing closer defense and energy ties. At the same time, Ankara also has managed to become more confrontational with both the United States and Russia.

Amid this backdrop, the effects of coronavirus are further stressing the heavily tourism-dependent Eastern Mediterranean economies that already were vulnerable – even though the pandemic hit there relatively late, and even though its public health impact has been lower to date than many global hotspots. The recession resulting from COVID-19 is hitting the energy sector especially hard. This is prompting delays in further regional natural gas exploration by Western energy majors, and hurting prospects for the EastMed Pipeline to ultimately deliver this natural gas to Europe.

Turkey's economy, which only began emerging from recession last year, appears especially impacted by the pandemic. Moreover, the country's reported infection and death rates are higher than those of many states in the region, and there are real concerns that these numbers represent underreporting of the actual levels.

Yet rather than seek help from the International Monetary Fund or mend ties with neighbors and important trade partners, Turkey has doubled down on its recent regional aggression and looked to its fellow Muslim Brotherhood-supporting ally Qatar for financial relief. In April, Ankara announced it would continue provocative exploratory drilling for natural gas in Cyprus' exclusive economic zone (EEZ), under the air and sea protection of the growing Turkish navy. Tensions then escalated over the following month as the region joined together to condemn Ankara's increasingly destabilizing behavior.

Given these developments, the pandemic and its economic fallout likely will lead to heightened security competition in the Eastern Mediterranean, driven primarily by Turkey, whose ambitions were underscored by Erdoğan’s pronouncement last month that “Turkey will be one of the outstanding countries in the world that will be reshaped after the pandemic.”[3] Indeed, in the wake of COVID-19 Turkish actions seem to follow in the footsteps of China, which has recently increased its assertive military behavior in the South China Sea and elsewhere. Like Beijing, Ankara may view the situation in Europe and America as an indication that Western powers will be preoccupied with domestic affairs for the foreseeable future and may not have the wherewithal to counter Turkey’s moves in the region.

Erdoğan may also conclude that the postponement of energy companies’ activities in the Eastern Mediterranean will lessen focus on the part of U.S. authorities, providing an opening for Turkey to advance its positions at the direct expense of American partners and regional stability more generally. Moreover, should the Turkish economy deteriorate further, escalating tensions with Greece, Cyprus, Egypt, Israel or others may become an increasingly attractive strategy to distract the public from economic problems at home. Libya is another arena for heightened Turkish tensions with the rest of the region, and one that is increasingly inseparable from the sharpening energy competition offshore.

Despite its own COVID-related challenges, the United States cannot simply continue to ignore the pandemic’s effects on Turkish-driven regional instability. As our policy project has laid out in multiple reports over the past year, the increasingly high stakes and uncertainty surrounding the future of the region means, for the first time since the Cold War, American policymakers must make abundantly clear to allies and adversaries alike that the Eastern Mediterranean is again a critical area of focus for U.S. national security strategy.[4]

To this end, the United States should enhance its naval presence in the region writ large – including through stronger U.S. defense cooperation with Greece. Washington also should appoint a Special Envoy for the Eastern Mediterranean to promote the collaborative exploitation of regional energy resources – including by creating a clear counterweight to Turkey’s efforts to disrupt peaceful energy development – as well as devise a negotiated solution to the Libya conflict and address the growing humanitarian consequences of COVID-19 in the region.

Before the Pandemic

Turkey became both increasingly assertive and isolated across the region in the years leading up to the pandemic.

Its historically good relations with Israel soured after the 2010 *Mavi Marmara* flotilla incident, and have not recovered since. Following the 2011 Arab upheavals, Ankara focused on supporting the rise of political Islam, particularly the Muslim Brotherhood, across the region. This included direct involvement in internal Egyptian affairs in favor of the Muslim Brotherhood presidency of Mohamed Morsi (2012-13), as well as supporting similar groups in the Syrian and Libyan civil wars.

Erdoğan's embrace of an Islamic-tinged Turkish nationalism also led to a more confrontational stance toward Greece and Cyprus, in particular disagreements on offshore natural gas exploration. Israel, Egypt, Cyprus and Greece agree on the application of the terms of the U.N. Convention on the Law of the Sea (UNCLOS) in the Mediterranean.[5] By contrast, Turkey claims a vast exclusive economic zone (EEZ) in the Eastern Mediterranean, based largely on its unique contention that islands – in this case, Greek islands – do not have an EEZ. Turkey also seems to deny an EEZ even to the southern portion of the Republic of Cyprus, while recognizing an EEZ belonging to the "Turkish Republic of Northern Cyprus," the northern third of the island occupied by Turkish troops and recognized as a sovereign state only by Ankara. But, other regional countries have ignored Turkey's position and pressed ahead with delimiting EEZ boundaries among themselves.

By 2019, a consortium of sorts emerged, uniting almost all regional states in an Eastern Mediterranean Gas Forum, with Turkey the notable exception.[6] This indicates the emergence of a growing alignment among regional governments who all perceive Turkey's actions as a threat to their energy development. Ankara, instead of modifying its behavior, responded by unilaterally drilling for natural gas in waters considered part of Cyprus' EEZ. It also concluded a November 2019 deal with the Libyan government to delimit their respective EEZs in energy-rich waters and claim rights in waters just off the island of Crete (see map). Based on each country's continental shelf, this provocative deal ignores the EEZs that UNCLOS would accord to Greece and Cyprus.

This move, in turn, drew considerable international opprobrium – including from the United States and European Union (EU), with whom Turkey's relations have likewise suffered under Erdoğan. Though Washington has provided limited rhetorical support for Turkey's positions in Libya and Syria in recent months, relations overall between Ankara and Washington have grown more confrontational. This has been true particularly after the 2016 coup attempt in Turkey – including Ankara's imprisonment of an American pastor in the subsequent purges – as well as in the wake of Turkey's policies in northeast Syria and its purchase of the advanced S-400 air defense system from Russia last year (which Ankara still has not operationalized). Combined, these events led to U.S. sanctions and a trade war that exacerbated Turkey's economic problems, contributing to a sharp drop in its currency in 2018 and a recession during the second half of that year. Its economy grew by less than one percent in 2019.[7]

But, worsening U.S.-Turkish relations and the S-400 purchase do not mean that Turkey's interests align with Russia's in Syria, and occasionally the two have clashed. Turkey's direct intervention in Idlib, in northwest Syria, in early 2020 exacerbated tensions when Russian and Syrian jets killed over 30 Turkish troops in an airstrike.[8] Similarly, Turkey's embrace of the Islamist-leaning, and U.N.-recognized, Government of National Accord (GNA) of Fayez al-Sarraj in Libya puts it at odds with Russia's support for the opposing Libyan National Army (LNA) under General Khalifa Hiftar. Coming atop its recent EEZ agreement with the GNA, Turkey's presence in Libya also has deepened existing tensions with Cyprus, Egypt, France, Greece and the United Arab Emirates (UAE), all of whom support the LNA. Most recently, Turkey and Russia find themselves supporting opposite sides in recent clashes between Azerbaijan and Armenia.[9]

COVID-19 in the Eastern Mediterranean

Thus far, COVID-19 does not appear to have hit the Eastern Mediterranean as severely as Europe or the United States. These trends could worsen, however, for several reasons. The region is part of a broader global hotspot encompassing much of the Middle East, including recently some of the world's highest infection rates throughout the Persian Gulf.[10] Moreover, the pandemic arrived in the region relatively late, and there remains the potential for further second-wave outbreaks like those occurring both in Israel and outside the Eastern Mediterranean. The reality is that coronavirus is further stressing regional economies that already were vulnerable before the pandemic emerged.

Unlike much of the rest of the EU, Greece and Cyprus have been fairly successful in flattening the curve, thanks to early preventive measures. As of late July, Greece's infection (406 per million) and death (19 per million) rates have been among the lowest in Europe, with Cyprus' infection (875) and death (16) rates similarly low. In both countries, new cases spiked in April and then receded. By contrast, while Egypt's reported infection rate is nearly equivalent to Cyprus and its death rate roughly triple, the number of cases only began rising steadily in June. Israel's prophylactic nationwide lockdown starting in April minimized its initial infection and death rates, but an early reopening in May helped drive up the country's numbers throughout late June and early July, to the point its infection and death rates approached 7,000 and 50, respectively.

Turkey's infection (2,690) and death (67) rates have been higher than many of its neighbors', and there are real concerns that these numbers represent underreporting of the actual levels.[11] Moreover, unlike Greece or Cyprus, the Turkish government's initial inaction in February and March actively contributed to the pandemic's spread inside the country.[12] Erdoğan exhibited a strong reluctance to impose measures that might endanger the country's economic recovery from the 2018 recession, and hence Turkey belatedly adopted a middle-of-the-road lockdown approach, compelling everyone under age 20 and above 65 to stay home and leaving the working-age population free to try to keep the economy functioning.[13]

Even these reported numbers are relatively low in the global context. Turkey's reported infection and death rates are less than one-quarter and one-sixth, respectively, the rate in the United States. Meanwhile, the death rates in Italy, Spain and the United Kingdom, all of which are among the hardest-hit in Europe, hover at 30 or more times greater than the death rate in Greece.

Beyond the statistics, however, is the stark reality that the tourism-dependent economies of the Eastern Mediterranean already were vulnerable and under stress before the pandemic. Greece experienced an economic downturn of 25 percent of gross domestic product (GDP) in the past decade as a result of its sovereign debt crisis, and had just embarked on a cautious recovery. Unemployment remains at roughly 15 percent, and forecasters now predict a contraction of 4-10 percent of GDP in 2020, in no small part due to tourism being 20 percent of the Greek economy.[14] Cyprus' economy, which is equally dependent on tourism, is projected to contract seven percent in 2020.[15]

Egypt underwent a severe economic crisis in 2013-16 following the Arab upheavals and the short-lived tenure of the Muslim Brotherhood in power. Terrorist attacks harshly affected the tourist industry, and a currency crisis in 2016 forced a 48 percent devaluation of the Egyptian pound. While this enhanced the economy's resilience and allowed resumed economic growth, it also meant skyrocketing commodity prices. Now the country's economy, which relies heavily on tourism – roughly 12 percent of GDP – and the Suez Canal, has been immediately impacted by the pandemic-driven slowdown in global travel and trade. Egypt also experienced $16 billion in capital flight, equivalent to seven percent of GDP, since March. Combined, these stresses drove Cairo to seek more than $7 billion in support from the International Monetary Fund (IMF) in spring 2020.[16]

While Turkey began emerging from recession just last year with less than one percent GDP growth, it has continued struggling as the pandemic worsens the basic imbalances already existing in the Turkish economy, setting up the country for a possible economic freefall in the wake of the coronavirus.[17] This is true especially in terms of foreign currency reserves needed to weather the economic fallout from COVID-19. At the start of 2020 its finance minister predicted five percent GDP growth for the year, but now it appears the pandemic will exacerbate the multiple headwinds already buffeting the Turkish economy, and could actually shrink GDP by five percent this year.[18]

In trying to rebound from the 2018 recession, Ankara spent billions of dollars of foreign exchange reserves to shore up the lira; in May 2019, Turkish credit default swaps climbed steeply as markets appeared to "price in a Turkish default" (only Venezuela, Argentina and Ukraine were considered more risky emerging markets). Throughout late last year and well into early 2020, the lira's steady fall further underscored Turkey's unsteady finances, as did the fact its industries have over $300 billion in liabilities – much of it in short-term loans.[19] As a result, Turkey already was on the precipice of a balance-of-payments crisis, and economic instability more generally, right before COVID-19.[20]

Now, like much of the rest of the region, the pandemic is negatively impacting Turkey's sizable tourism industry, at the same time that economic contraction in the EU also diminishes demand for Turkish products in its main export market, further drying up much-needed sources of foreign currency and adding to the prohibitive cost of borrowing.[21] Furthermore, Ankara's strained diplomatic relations with the United States, including U.S. concerns about Erdoğan's politicization of Turkey's central bank, undermined prospects for a deal to help Turkey's economy by exchanging lira for U.S. dollars.[22] Yet rather than impose capital controls or seek help from the IMF like Egypt, Erdoğan turned to Qatar for help via a May 2020 agreement, worth up to $15 billion, to swap lira for Qatari riyal.[23]

Much about Libya's situation remains unknown. Its reported infection (411) and death (9) rates are very low, but likely this reflects an inability to collect reliable statistics amid an escalating civil war. The years-long conflict has destroyed much of the country's health and other critical infrastructure before coronavirus, worsened by a shortage of medical workers. It also has driven internal displacement of civilians which, in combination with mass refugee flows through Libya, compounds unsanitary overcrowding and undermines other efforts to contain the spread of disease. Additionally, the civil war has stanched Libya's oil production and exports, deepening the country's economic crisis that further inhibits work to counter the pandemic. Finally, warfare throughout history has brought with it the spread of pestilence – all the more so in the case of Libya, which increasingly is home to thousands of foreign fighters from at least five countries on three continents.[24]

Impact on Energy Development

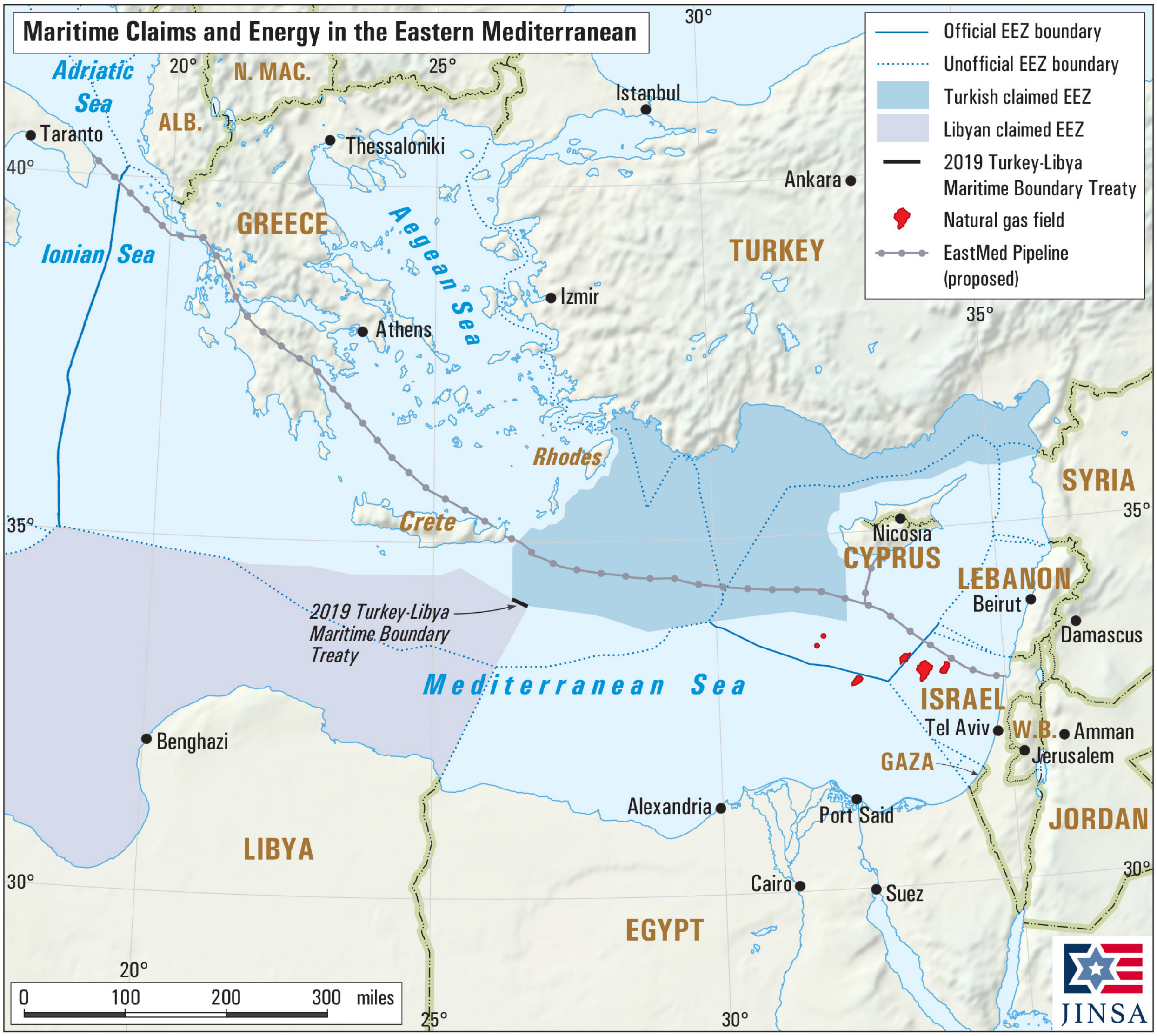
For countries across the Eastern Mediterranean, the economic recession resulting from the COVID-19 pandemic is affecting energy more negatively than most other sectors, though this has not prevented Turkey from continuing its aggressive posture toward its neighbors' natural gas exploration.

Demand for oil and natural gas collapsed as a result of COVID-related economic inactivity, with crude oil prices plummeting from nearly $60 per barrel (bbl) at the beginning of the year to near zero in the spring, before rising above $40/bbl in July. While natural gas, unlike oil, is typically priced in long-term agreements, importers like China and India have already claimed "force majeure" to opt out of contracts as natural gas demand falls. Now, as the prospects for a "V-shaped recovery" look more remote, the energy industry is beginning to adapt to what is likely to be a long recovery.[25]

The Eastern Mediterranean is no exception. A three-fold combination of factors – the pandemic's direct impact on regional countries' tourism-dependent economies, the collapse in energy prices and the expensive technical hurdles that already existed to producing offshore natural gas there – poses growing challenges to the viability of developing the region's resources.[26] In April, Cypriot Energy Minister Giorgos Lakkotrypis confirmed that ExxonMobil is pushing back critical appraisal drills in Cypriot waters to September 2021.[27] This concerns the Glafcos site, whose estimated 5-8 trillion cubic feet of natural gas could make it the largest such discovery to date in Cyprus' EEZ. A second appraisal drill scheduled for late 2020 or early 2021 has been pushed to early 2022. ExxonMobil, which is exploring the site, announced it is reducing its 2020 capital expenditures by 30 percent, from $33 billion to $23 billion. Later in April, Westwood Global Energy Group predicted that exploration well numbers could be down 35 percent globally from 2019 numbers, with few high-impact wells in the Eastern Mediterranean in 2020.[28] In May, Italy's ENI and France's Total likewise announced they would postpone drilling in Cyprus' EEZ until at least April 2021.[29]

Israel also confronts new COVID-related challenges in its recently-burgeoning energy sector. The country has committed to developing natural gas both for domestic consumption and export since discovering two major offshore fields in 2009-10, but the collapse of the global energy market has stranded it with a long-term contract that forces it to pay three times the global average for natural gas.[30] In July, however, Chevron announced it would buy Israel's Noble Energy – which has stakes in both of Israel's two largest offshore natural gas fields – in the largest U.S. energy deal anywhere in the world since the advent of COVID-19.[31]

Meanwhile Israel's and Cyprus' hopes for an "umbilical" to Europe, in the form of the $6-7 billion EastMed Pipeline (EMPL) to export natural gas, also face COVID-related feasibility concerns. At the beginning of the year, Israel signed a memorandum of understanding with Greece and Cyprus to build the EMPL to connect the three countries with Italy and the wider European market, and Israel's parliament ratified the agreement in July.[32] Even prior to COVID-19, however, construction already faced serious technical challenges posed by underwater trenches, active geological fault lines and the sheer depth and length of the pipeline. It also confronts the new geopolitical challenge from Turkey's November 2019 EEZ agreement with the GNA, which intentionally cuts across the EMPL's planned route. The advent of coronavirus has only added to these hurdles, by hurting European energy demand and forcing the EU to focus on stimulus packages to mitigate COVID-induced recession.[33]



The downturn in exploration, however, has not seemed to impact Turkish activity. On April 19, Ankara announced that the drillships *Fatih and Yavuz* and research vessels *Barbaros* and *Oruç Reis* would continue their activities in the Eastern Mediterranean under the air and sea protection of the Turkish navy. The next day, Cyprus condemned Turkey's decision to send a vessel to drill for oil in Cyprus' EEZ.[34] The Cypriot government stated that "this new illegal 'act of piracy' constitutes a further severe violation of the sovereign rights and jurisdiction of the Republic of Cyprus, contrary to international law." President Erdoğan responded that "Turkey will continue to defend these rights…. It's this decisiveness that makes Turkey strong."[35]

The war of words escalated in May, when the foreign ministers of Cyprus, France, Egypt, Greece and the UAE issued a joint declaration denouncing "the ongoing Turkish illegal activities in the Cypriot Exclusive Economic Zone and its territorial waters," and condemning "the escalation of Turkish violations of Greek national airspace."[36] Ankara's reaction was swift.

The Foreign Ministry decried the five countries as an “axis of malice,” and their statement as reflecting “the hypocrisy of a group of countries who are seeking regional chaos and instability … and which have fallen into a delirium, as Turkey is disrupting their agendas.”[37] In July, Turkey announced plans to send *Oruç Reis* into Greece’s claimed EEZ to explore for oil and natural gas, with a sizable portion of its naval fleet nearby, prompting Greece to place its own forces on high alert. Tensions were diffused, at least temporarily, when German Chancellor Angela Merkel intervened with the leaders of both countries and *Oruç Reis* remained in Turkish waters – though the Turkish government continues disputing the legitimacy of Greece’s EEZ claims.[38]

Geopolitical Implications

The pandemic and its economic fallout in the Eastern Mediterranean already are heightening security competition in the region, driven primarily by Turkey. While Ankara's growing economic woes might logically drive it toward accommodation with its Western partners, to regain the confidence of international markets and pave the way for possible IMF financial support, its behavior indicates the opposite trajectory.[39]

Indeed, in the wake of COVID-19 Turkish actions seem to follow in the footsteps of China, which has recently increased its assertive military behavior in the South China Sea and elsewhere.[40] As Turkey's Vice President Fuat Oktay declared in June, "We are tearing up and throwing away the maps of the Eastern Mediterranean that imprison us on the mainland."[41] Like Beijing, Ankara may view the situation in Europe and America as an indication that Western powers will be preoccupied with domestic affairs for the foreseeable future and may not have the wherewithal to counter, or meaningfully oppose, Turkish moves in the Eastern Mediterranean. To date, certainly, Turkey's actions have encountered little pushback from either Europe or the United States, except minimal EU sanctions.[42]

Turkish leaders also may conclude that the postponement of energy companies' activities in the region will lessen America's own focus, enabling Turkey to advance its positions further. Meanwhile Turkish companies have amassed a combined nearly $2 billion in debt to Russian energy giant Gazprom, posing a national security concern for Turkey and complicating further its relationship with Russia.[43]

If energy companies operating in Cypriot waters temporarily cease operations, this may provide Turkey with a unique window to move unilaterally and create a fait accompli that companies or nations will not be willing or able to challenge. Should the Turkish economy deteriorate further, escalating tensions with Greece and Cyprus may become increasingly attractive as a nationalist mobilization to distract the public from economic problems at home. At the same time, Greek Prime Minister Kyriakos Mitsotakis and Turkish President Tayyip Erdoğan discussed their coronavirus responses over the phone on June 26, a productive step considering there had been little direct communication between both governments for some time beforehand.[44]

Moreover, for Turkey and the region as a whole, recent developments suggest that Eastern Mediterranean energy competition can no longer be isolated from the civil war raging in Libya. In retrospect, the Turkish-Libyan EEZ agreement of November 2019 may have connected these issues at the hip, as indicated by France and the UAE joining in condemning Turkish activity in the Eastern Mediterranean. The UAE also plays an increasingly prominent role supporting the LNA in Libya.[45] So does France, in defiance of the EU's more balanced approach to the conflict and despite France and Turkey being NATO allies.[46]

In fact, in recent years a new geopolitical divide is pitting two rival Sunni blocs against each other. On the one hand, there is a conservative bloc led by Saudi Arabia and the UAE. On the other lies a radical bloc led by Turkey and Qatar, which includes the transnational Muslim Brotherhood. Several years ago they squared off in Egypt, where Turkey and Qatar sought to boost the presidency of Muslim Brother Mohamed Morsi. Yet the conservative bloc managed to secure Morsi's ouster, and have instead supported the rule of Abdel Fattah al-Sisi in Cairo.

Reeling from this defeat, Ankara and Doha appear to have doubled down on a rematch in Libya, where they have boosted the Tripoli-based and Muslim Brotherhood-influenced GNA government.

This conflict is both geopolitical and ideological. The UAE's goal of rolling back political Islam, particularly the Muslim Brotherhood, across the Middle East and North Africa has motivated its regional involvement. Both Israel and Greece, building on their concerns of Turkey's aggressive posture, have constructed tighter links to the Saudi- and Emirati-led conservative bloc, as has France, another state seeking to roll back Islamism in North Africa and promote energy development by Cyprus.

Whither the United States?

Despite its own COVID-related challenges, the United States cannot simply continue ignoring Turkish-driven instability across the Eastern Mediterranean and the compounding geopolitical rivalries in its wake. A central part of the solution must be greater clarity in U.S. policy. The Trump Administration sided with France in its recent naval dispute with Turkey off the coast of Libya, where the two NATO allies back opposing sides in the civil war. Yet it also continues supporting the Turkish-backed GNA in Tripoli and criticizing the EU's singling out of Turkey in its naval arms embargo on Libya.[47] Meanwhile tensions continue to rise in Libya and around the region more generally.

The increasingly high stakes and uncertainty surrounding the future of the region means, for the first time since the Cold War, American policymakers must make abundantly clear to allies and adversaries alike that the Eastern Mediterranean is a critical focus for U.S. national security strategy.

As this group laid out in our May 2020 report on Turkey's intervention in Libya, enhancing the U.S. diplomatic and naval presence in the Eastern Mediterranean would enable the United States to demonstrate tangible commitments to regional stability, undergird its claim to a leadership role in addressing the Libyan conflict and check destabilizing Turkish power projection.[48]

The United States should articulate greater, and more concrete, support for Greece's and Cyprus' warming relationships with Israel and Egypt. Washington also should strengthen bilateral military ties with Athens, including by bolstering U.S. forward deployments in Greece and viewing that country (and potentially Cyprus) as a viable and reliable alternative for relocating U.S. military assets currently deployed in Turkey.

In tandem with a more robust strategic focus and force posture in the region, the United States also should appoint a Special Envoy for the Eastern Mediterranean to devise a negotiated solution to the Libya conflict and address related regional security concerns. He or she should work with the Eastern Mediterranean Gas Forum (EMGF) to foster circumstances for cooperative development of the region's major recent energy discoveries and its potential for significant additional finds. This has the advantage of working with pro-U.S. countries that already share the overarching goal of turning the region into a major energy hub, and that have taken concrete steps to coordinate among themselves toward that end. It also would help create meaningful opposition to Turkey's growing efforts, amid the pandemic, to thwart these efforts by EMGF countries.

An American envoy also should lead diplomatic efforts toward a negotiated settlement to end or mitigate the Libyan conflict and establish a non-Islamist regime that serves Libyan national interests, as well as address the growing impact of COVID-19 inside Libya and around the region more generally.[49]

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