

# Sharing Energy Resources of Eastern Mediterranean: Regional and Global Dynamics

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**Abstract:** The newly discovered gas sources establish a political and economic ground for the formation of regional and global alliances in the Eastern Mediterranean. Although these new discoveries have the potential to alter the functioning of politics and the economy, current and past controversies, political instability, how natural gas will be shared between countries, and competition power of countries in natural gas market prevent natural gas production and exploration at the Eastern Mediterranean bay. On the other hand, in consequence of gas explorations that in the last decade, it is expected that in the near future there will be much more regional and global playmakers in the Eastern Mediterranean. Research, development and export speed of the gas reservoirs, each and every decision to be taken by the countries in the Eastern Mediterranean, will be the dynamic weighted decisions of the national energy politics and regional politics. That's why, in this study, the lead energy players in the Eastern Mediterranean and their disagreements are investigated and, the goals and targets of the global powers on the energy resources available in the Eastern Mediterranean are analysed.

**Keywords:** Energy, natural gas, shale gas, Eastern Mediterranean

**JEL codes:** Q34, F59, Q48

<https://doi.org/10.25167/ees.2017.44.2>

## 1. Introduction

In recent years it is observed that both regional and global politics and diplomacy are focused on the Middle East, especially on Eastern Mediterranean. There might be various reasons for the Middle East to become a center of global politics. However, energy is the major part of the game played on the Middle East since the 19th century up to day.

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In the beginning of the twentieth century, Middle East had become the center of global conflicts with the widespread development and usage of petroleum. However, after the vast natural gas sources was found in the Eastern Mediterranean region, the region has become an energy center. Then the Eastern Mediterranean region has become the political and economic target of the regional and global powers.

Energy issues have a long historical past affecting the course of relationships between governments. There is no doubt that newly discovered gas sources are establishing a political and economic ground for the formation of regional and global alliances in the Eastern Mediterranean. However, the present and past disputes, political instabilities, division between countries and degree of competition on natural gas are holding the production and discovery of the natural gas in the Eastern Mediterranean at bay.

The disputes, insecurities and conflicts between the countries who share the Eastern Mediterranean border hampers the region to have a stable structure. Undisputedly, these conflicts and tensions have a long history. Yet in the recent years, there are some evaluations suggesting that there might be new alliances by eliminating the basic disagreements and forming unique economic and strategic co-operations. The Coal & Steel Market established by the European countries after the World War II hints a great example of such economic and political unity and a possibility for Eastern Mediterranean countries to reach such an integration is mention by some quarters.

This cooperation resembling the integration in Europe will cause relief in the economies of countries possessing these resources as Israel, Egypt, Southern Cyprus and Lebanon, and on the other hand it will give Turkey an advantage to reach her target of becoming an energy center due to her strategic location although not having these energy resources and also it will decrease the dependency of Europe on Russia in energy resources to a certain degree.

However, for the realization of this condition, there should be a regional cooperation. The foundation of this cooperation is seen between Israel – Southern Cyprus, Greece – Southern Cyprus and Egypt and Turkey – Israel – Greece. The lately progress in the warm relations between Turkey – Greece, and Turkey – Israel is evaluated as “good” signs of a potential cooperation that might happen in the future.

Although some positive developments occur regarding the regional cooperation, the global powers who focused on the region, and want to control the energy and the energy traffic are some of the basic obstacles preventing the potential cooperation in Eastern Mediterranean.

Some of the reasons that complicates the economic and political development of the region even more are as follows:

- i) The perception of the East Mediterranean as an important area on diversifying the energy demand by the European countries and securing the energy safety which was seen to be so fragile in the Ukraine crisis,
- ii) Russia's unwillingness to lose the dominion over energy which is the key factor in her economy,
- iii) The policies applied by the United States and her interests of continuing her domination and making it more permanent.

In this study, the natural gas reservoirs that might alter the face of the economic, strategic and political structure of the region will be mentioned briefly; then the lead energy players in the region and their disagreements will be approached and lastly, the goals and targets of the global powers on the energy resources available in the Eastern Mediterranean are going to be analyzed.

## **2. The Eastern Mediterranean Energy Reservoirs and Their Importance for the Region**

Israel, Egypt, Southern Cyprus, Lebanon, Syria and Palestine are the countries who have potential energy resources and where the natural gas discoveries in the Eastern Mediterranean are performed. In this section of the study, available and potential gas reservoirs of those countries and importance of these reservoirs for their own energy markets and other international markets will be explained.

### **2.1. Israel: Energy Resources and Potential of Becoming the Energy Island**

The best known discoveries in the Eastern Mediterranean are Tamar and Leviathan regions of Israel discovered in the years 2009 and 2010. These are qualified as the biggest gas discoveries of the last decade (Nakhle, 2016). It is mentioned that 35 trillion cubic meters of natural gas was discovered in the waters of Israel and Cyprus, and there is possibility of finding 85 trillion cubic meters of natural gas reservoir in the coasts of Israel, Syria, Lebanon and Palestine (El Katiri and Fattouh, 2014: 9-15). There is no doubt that natural gas discoveries in the region were not fully completed due to various reasons. Thus different amounts are indicated in a number of sources and

research institutions and there isn't any question about the rich resources in the region in terms of natural gas.

There is no doubt that discoveries between the years of 2009 and 2011 of the natural gas in Tamar and Leviathan in Israel and Aphrodite region in the waters of Cyprus had brought the utmost attention to the region. Analysts states that the newly discoveries of gas will not only strengthen the energy cooperation, they will start a new aeon for the economic and political stability in the region even if the expectations are not so high as the beginning (Tagliapietra and Zachman, 2015).

It is observed that the fate of the region has changed with that aspect and its economic, political and strategic importance has increased. So that the discoveries of the natural gas have another meaning apart from the usage in the discovered countries. For example this gas has an export value for Israel to Europe and nearby markets at first and potential shareholders to benefit from Eastern Mediterranean natural gas. Thus, the value of the Eastern Mediterranean natural gas depends on how it will be used in terms of economic and political ways. In truth the regions where the major discoveries are made reside in two neighbouring countries Israel and Egypt. Yet, the political instabilities in the region, border problems and the historical hostilities, global and regional competition give rise to difficulties such as the extraction and utilization of this energy source. However, when financial interest prevails over these obstructions and cooperation is formed, this gas will play a strategic role (El Katiri and Fattouh, 2014: 9-15).

Israel is one of the biggest natural gas consumers of Eastern Mediterranean. While she was dependent on the gas of Egypt until 2012, this dependency was put on hold with the increase of terrorist attacks in the Sinai Peninsula. Thus people of Israel had to face power shortages. This has changed drastically with the gas in Tamar region put into operation in 2013. With the gas discoveries, while the share of the natural gas in the electricity production was 20% in 2008, this ratio has increased to 40% in 2010 (De Micco, 2014) and to 50% in 2014 (The Natural Gas Sector in Israel, 2015) with the development of infrastructure projects regarding the transition to natural gas performed by Israel Infrastructure Ministry. Besides, since it is expected that supply of the natural gas will get ahead of the demand, Israel government approved to export 40% of the natural gas to be extracted from the sea in July of 2013 despite the protests of politicians of opposition parties (Micco, 2014). This decision is taken as a result of the termination of natural gas coming from Egypt, but Israel used to produce only 14% of the gas it consumed in those years (Roberts,

2014: 15-29). Israel continued to exist in an isolated manner from her neighbours since her establishment.

Boycott of Arabic countries prevent Israel to buy cheap oil from her neighbours and thus, oil from her partners over the globe Russia, Africa, Mexico and coal from the South America countries and all resources were imported. This has created a unique energy system for Israel and she had to meet 90% of its energy needs at solar energy.

Having an economic and political history full of conflicts with her Arabic neighbours and wars, gave Israel a motivation and it made her to try and perform discoveries both in the land and in the seas. Strategic goal was to decrease the import dependence (El Katiri and Fattouh, 2014: 9-15). As a result of these efforts, discoveries performed in Mari-B region supplied for the domestic consumption shortly after; it was observed that the discoveries in the following years had caused disappointment. Then gas discoveries in huge scales were performed in Tamar and Leviathan regions. These discoveries were enough to supply for her domestic demands and also export. Natural gas resources discovered in the sea of Israel passes all of the Arabic neighbours who has directly a border to her including Syria.

These discoveries up to date present major opportunities regarding the energy security and economic welfare with the hope of major hydrocarbon sources in huge volumes lying beneath the Eastern Mediterranean. Current findings are already enough for Israel to transform from an Import dependent country to an energy independent country. If these countries can establish both technical and political infrastructure, they will take their place among the exporter countries in the World, and they already have this potential. By the transformation of these countries to an exporter country, Europe and Asia markets will have new and competitive gas supply options and by diversifying the possible supply sources and routes, they will contribute to the much debated issue of European safety in terms of natural gas, European Security (Karbuz, 2014: 29-39). Europe searches for resources to supply natural gas alternatively since the Gazprom supply is delicate in political terms. Israel's development of major natural gas resources in sea shores and Cyprus territorial waters made those countries potential game changers (Cohen, 2015).

European Union accepts the necessity of forming good relations with the neighbours in order to provide energy security, to reach climate change targets, to improve the variety of energy sources and supply routes. In the next 15 years, Eastern Mediterranean will play an important part

in reaching the goals of providing the 100 billion cubic meters of natural gas per year which Europe needs.

As a result, Mediterranean Countries and their close neighbour countries are ready to utilize the natural gas resources in the region economically. The region is dependent to oil for the electricity production. For example, Lebanon is 95.1%, Jordan is 72.5% and Cyprus is 96.4% dependent on oil for the electricity production (Johnson, Ross, Zemenides, 2015). As a result, countries like Egypt and Jordan have troubles with energy and Cyprus has very high cost of energy when compared to any European Union member country. In the case of transition to natural gas, since it is a stable power resource, lower costs of energy both for industrial production and consumers will be available.

Israel has been seen as an “Energy Island” for a long time. Energy shortage in 2012 had forced Israel to follow a strategy to diversify the energy resources and in a duration shorter than three years, she had come to a different position from an energy dependent country.

Besides, having very complicated relationships with almost all of her neighbours, stands as an obstacle in front of the potential of becoming an “energy island” (Sachs-Boersma, 2015: 1-25).

Israel economy and energy sector are currently switching from coal to natural gas. Also, Israel government predicts that 70% of the electricity production and 50% of the entire energy consumption will be reinforced with the natural gas in the year of 2030. It is expected that Israel will be one of the 25 leading gas exporters of the world (Johnson, Ross, Zemenides, 2015). So that she decides to export 40% of the reservoirs as mentioned before.

However, there are major obstacles reaching these targets and goals. It will be explained in the following chapters what those obstacles are.

## **2.2. Egypt: Powerful Player of the Regional Cooperation**

Egypt has played important roles in the history of world since the first ages as a country in Africa which has a government tradition. It has been the targets of the regional and global powers due to geopolitical geostrategic location as well as the Suez Canal. Thus she has faced political and economic instabilities from time to time.

Egypt was an exporting country, not a natural gas importing one. Egypt was also affected by the Arab Spring which started in 2011 and had gone through a series of political instabilities

and continues to face them. The attacks to the gas carrying pipelines to Israel with the peace treaty made in 1979 after the overthrow of Hosni Mubarak had caused this flow to end and Egypt has faced her own energy problem in 2012.

After the overthrow of Hosni Mubarak regime, it was not seen possible to restart the energy flow. Because domestic market of Egypt was face to face with a gradually increasing gas shortage and old regime was the focus of critics due to selling natural gas to Israel. According to the claims of the critics, treaty between Egypt and Israel had broken the energy strategy of Egypt because it anticipated cheap gas sale to Israel (Sachs-Boersma, 2015: 1-25).

However this issue was changed with the discoveries of major natural gas resources in the region encompassing 100 kilometers square in the waters of Egypt. Italian ENI Company has announced its discovery in 30th August 2015 to the entire world's public opinion. The recent gas discoveries in the Eastern Mediterranean are summed up in Table 1.

**Table 1. Recent gas discoveries in the Eastern Mediterranean**

Gas Field	Country	Year of Discovery	Resources
Tamar	Israel	2009	280 bcm (Gross mean resources)
Leviathan	Israel	2010	620 bcm (Gross mean resources)
Aphrodite	Cyprus	2011	140 bcm (Gross mean resources) 850 bcm (Gross mean resources)

Source: Ellinas et al., 2016

As well as providing an advantage for Italian Energy Company ENI and the other energy companies in the competition, it will have an affect first in the Egyptian market, then regional and also global markets (Cunnigham, 2015). Egypt states that she has 30 trillion cubic meters of resources in her natural gas reservoirs, and 40% of these had been confirmed (Ronen, 2016). No doubt that Egypt will use these reservoirs to supply for the domestic demand. However, it was stated that natural gas produced by Egypt will exceed the domestic consumption by the year of 2020.

Timing of the ENI Company's discovery of natural gas in the territorial waters of Egypt happened in the most suitable period for the mentioned country. Egypt's natural gas demand had increased 7% between the years of 2004-2013. Besides, the possibility of exporting the natural gas found in Israel's territorial waters as well as supplying for her own domestic market was also

effective in concentrating on those discovery works, which actually Israel was hoping that Egypt will also be a market for her natural gas (Cunnigham, 2015).

When the magnitude of these discoveries is considered, it will be seen as it is a factor which might affect the Eastern Mediterranean region systematically in the geopolitics of the region. If there is something certain about the natural gas resources in Zohr region, it is that it will provide for the Egyptian Domestic Market first. Because due to energy shortage, Egypt who rented two hundred storages and re-transform to gas units each in the last five years, started to import Liquid Natural Gas (Tagliapietra-Zachman, 2015). In addition to that, the discovery of enormous gas region in the Mediterranean waters of Egypt by the Italian government company ENI, is qualified as the most important step in making Southern Europe an Energy Center. Discovery of this gas market will adversely affect the LNG export of Russian giant energy company Gazprom to Egypt according to 5-year contract signed in March 2015 (Scimia, 2015). However, international energy research companies anticipate the natural gas production of Egypt to exceed the domestic consumption until 2020 and Egyptian economists state that it is possible to export natural gas even before the year of 2020 (Emam, 2016).

Discovery of Zohr gas region in the territorial waters of Egypt, has been the hottest topics in the natural gas markets. With this discovery, it was seen that cooperation on the natural gas energy in the Eastern Mediterranean blossomed again. All in all, this regional geopolitical region will not be limited to Egypt, it will affect the entire Eastern Mediterranean.

With these reservoirs that Egypt holds, it has been stated that she holds the keys of natural gas future of the Eastern Mediterranean (Tagliapietra and Zachman, 2015). As Egypt can form an energy center with the cooperation of Israel and Cyprus, she can also act alone. However, when global risks of acting alone are considered, it is obvious that possibilities of cooperation will be pushed. Also, because the long term contracts signed between Norway and Russia due to import necessities will end in 2020, it will provide new supply options to Europe.

Formation of a new energy center will firstly be assigned by countries' own domestic policies and regional politics to be followed and the roles of the global policies and politics are also not independent from all these factors. It will be adequate to analyze the willingness of global companies who know this fact to participate in the Eastern Mediterranean gas project in this aspect. Efforts made by the Russian companies including Rosneft, Lukoil and Gazprom to buy shares from

Leviathan of Israel and Zohr regions and their demand to determine the time of commercializing is caused by their desire to take part in the region as a key player (Baris, 2016).

### **2.3. Cyprus: EU's Stair to the Natural Gas**

Cyprus is the third biggest island of the Eastern Mediterranean and gained her independence in 1960. After the military intervention carried out by Turkey in 1974, she was actually divided into two parts and declared her independence single-sided in 1983 and taken the name Northern Cyprus Turkish Republic. However international law did not recognize her. This problem named as "Cyprus Problem" is one of the basic subjects of the Turkish politics and also of the Turkish foreign policy at the same time since the years of 1974- 1983.

The problem has gained another aspect with the discovery of natural gas in the Cyprus territorial waters. Among the reasons of which it gained another aspect is that Turkey claims for the natural gas found in those waters and the diplomatic and politic arguments. The energy resources lying in Cyprus and around her which will play a big part in the Eastern Mediterranean energy area has also a great part in energy diplomacy in Turkey. Turkey states in every opportunity that every resource including the natural gas to be extracted in the region belongs to the people of the island (Ustun, 2016) which the political weight of the Turkey about the usage of the resources and transfer to the markets is caused by her key location. On the other hand, it is caused by EU's being dependent on foreign resources in terms of energy and none of the sources which the energy is produced are owned by European countries.

In fact, EU is an old continent dependent on foreign resources in terms of energy. The European Union Countries dependent mostly on Russia in terms of energy resources were troubled with Russia's usage of natural gas as a political tool in the Ukraine crisis; and this caused a sensitivity to appear about energy security. After Southern Cyprus was taken into EU membership, it was observed that EU has more actively participated into the natural gas debates in the Eastern Mediterranean (Gunay, 2015).

The natural gas discoveries in the year of 2009 and the following years had become a milestone for the Cyprus economy and politics. In a study carried out by Massachusetts Institute of Technology (MIT), it was stated that gas reservoirs are in such amount that it might be exported

after supplying for the domestic consumption. However, there are technical and political difficulties blocking the export. When compared to pipelines in the sea, liquefying the natural gas is the logical option. However, in order for a LNG facility's construction to be possible, minimum area should be 170 bcm. But the dimension of the Aphrodite area is 142 bcm (Nakhle, 2016). This subject means that new discoveries should be made and additional materials should be bought from the neighbors for re-exporting. Yet, another subject to be considered is if the Aphrodite discoveries are set aside, there was not any progress or success in the other discovery works.

Together with the technical difficulties, political obstacles should be overcome in order to export and use the energy. Even though Exclusive Economic Zone of Cyprus is recognized by UN, EU, USA, Russia, Israel, Egypt, Greece and Lebanon, not only Turkey does not recognize it, but also she doesn't recognize the Republic of Cyprus. Also Turkey claims for the resources to be extracted as a country who has 37% of the island. Greeks of Cyprus promise that Island will become one again and the income gained from these resources will be fairly shared (Johnson, Ross, Zemenides, 2015). And Turkey wants to take part in the energy game by sending seismic research ships to the region regarding her and Northern Cyprus Turkish Republic's claim on the Exclusive Economic zone in the reunion negotiations.

Mustafa Akinci who was elected to be the President since 2015, has started the negotiations for the reunion of Cyprus and even though these are interrupted within the scope of confidence building measures, and these negotiations continues on a positive plane.

It is hard to utilize this energy without the strategic alliances in Cyprus and the Eastern Mediterranean. Definition of the strategic alliance is also emphasized as the major motivation share (Theodoulou, 2016).

In the following phases of the study, the countries who take part and who want to take a good part in the energy game in the region, their goals and targets, and the reason behind those targets will be mentioned. And considering these countries with regard to the goals and targets of primarily Turkey and then EU, USA and Russia, will help to better understand the dimensions of the game. Undoubtedly there are many countries who want to be the play maker in the Eastern Mediterranean. Turkey which is an indispensable country due to her geostrategic position among these countries, global power; Russia, EU, and USA's position to Eastern Mediterranean, their interest and policies will be tried to be mentioned.

### **3. The Lead Energy Players in the Eastern Mediterranean and Their Disagreements**

The lead energy players in the Eastern Mediterranean and conflicts between those countries are investigated in this part of our study.

#### **3.1. The Candidate Country for being an Energy Center: Turkey**

Some countries gain economic and political importance due to having rich hydrocarbon resource reservoirs and become target countries. Although becoming a target country brings economic and strategic advantages together with it, it also contains risks such as political instabilities, economic collapse because of regional and global threats. Nowadays hydrocarbon rich countries such as Iraq and Venezuela experience exactly the same. In another terms, while any kind of rich resources are considered to be welfare and peace maker in that country, this will not realize in every circumstances.

Although Turkey is poor in terms of energy, she is the sole country that is not passed without natural gas resources of Middle East is subjected to a discussion. The basic reason of that is she is gaining an importance both as a regional energy transition center and a consumer more and more every day. USA based Energy Information Administration confirms that in other data (Le Bon, 2015).

Turkey is country in the position as a NATO member and a country which EU depends her hopes on. She is an important country which connects Iraqi gas and oil, Russia, Caspian to Europe with the pipelines (Johnson, et al., 2015). In the last 10 years with the development of Turkish economics, consumption of natural gas and oil had increased. Her limited reservoirs violate almost all of the energy resources that needed. While the oil production was 85000 barrels in 1991, it is known that it decreased throughout the years and fell to 43.000 barrels in 2004. Turkey's total liquid fuel consumption in 2013 was concluded as 734.000 barrels/day in average. According to IEA data, it is expected that raw oil import of Turkey will be doubled in the following decade (<http://middleeastnewservice.com.>, Turkey: A Future Energy Hub, 10.10.2015).

Turkey was one of the fastest growing countries in the last decade and the increase in the energy consumption was provided with natural gas primarily. Natural gas was consumed twice as much from than the value in 2004 which was 22.1 billion cubic meters as 48.6 billion cubic meters

in 2014. Consequently, Turkey grew up as dependent on Russia in terms of natural gas as 56% of her natural gas consumption in 2014 has been imported from Russia (World Energy Council, 2016).

Due to Turkey's condition of uncertainty in Middle East and tension in the relationships with Russia, she is in the struggle of diversifying the sources in a potential natural gas crisis. Russia has been the greatest gas supplier for Turkey over Black Sea and Ukraine. However, due to the possibility of termination of Ukraine pipeline in 2019 caused by the crisis between Russia and Ukraine, Turkey needs to prepare a backup plan (Jin, 2016).

In the period following the downing Russian fighter jet in the date of 24th November 2015 in the border of Turkey-Syria, Turkey whose relationship has gone bad with Russia will set aside her differences with Israel and Egypt and will want to decrease her dependence on Russia for the major part of her oil and natural gas consumption. While Turkey negotiates with Israel to minimize the opinion differences, it is stated that she might also and even she did start negotiating with Egypt in the same manner (Enam, 2016). When looked closely, after the overthrow of Mohammad Morsi government, there has been a moderation in the speeches of Recep Tayyip Erdogan who is the president of Turkey and was a full supporter of the Muslim Brotherhood. Although the downing of the Russian jet and this event is considered as a threat to Russian military since 1953 by a NATO member country (Weiss, 2015) and this act is pointed as the reason behind the deterioration in the Russia-Turkey relationship, and even though there is a grain of truth in these opinions, Russia's invasion on Crimean and the deep differences of opinion about Russia should also be remembered.

The discovery of Eastern Mediterranean energy has increased the tension even more between for some countries and warmth the cold traditional relationship between some other countries. With that aspect, the energy has undertaken the role of guiding engine which advocates the regional cooperation (Karagiannis, 2016: 1-11). It is obvious that Turkey will not desire to be the part who will weaken the role of an energy transition government. Hence, Israeli and Turkish authorities are negotiating about the construction of natural gas pipeline (and other subjects) for a long time. Another reason of this cooperation is that Russia has begun a military intervention to Syria directly and this issue has concerned both Israel and Turkey. While Turkey claims that Russia supports Assad regime, using the ISIS as an excuse, Israel claims that Russia is trying to build a regional domination (Cicekci, 2016: 42-45).

Contract between Israel and Turkey, which is about the selling of Israeli natural gas to Turkey and transferring it to Europe through Turkey will naturally disturb Russia. As a matter of

fact, Russian Foreign Secretary Lavrov, reminded Israeli authorities that Russia is the major natural gas supplier of Turkey and stated their disturbance. However, both Israeli and Turkish supreme authorities reflected that contract between them is near.

Israeli Consul General Shai Cohen stated that feasibility studies have been completed by the private sector a long time ago, projects are only a matter of time, and the status of the region requires Turkey and Israel to be in cooperation by claiming that Turkey is the most advantageous and suitable country for the transfer of Israeli natural gas ([www.tgrt.haber.com.tr](http://www.tgrt.haber.com.tr), 06.04.2016).

Even if the Israeli President meets/met with the Cypriot authorities to transfer the Israeli gas to Greece through Cyprus, Cyprus has a status of divided island. While the southern part of Cyprus is a member of EU; northern part is only the Northern Cyprus Turkish Republic recognized just by Turkey. While the cost of pipeline through Cyprus is 15 billion dollars, a pipeline that will pass through Turkey is 2 billion dollars (Nir, 2016).

The main reason behind adaptation of Iran's nuclear program by USA and Russia is that both of the countries have disappointments with Sunni allies. Israel who believes that West and Russia is going for a "concept change", perceives these developments as a threat to herself. Israel and Netanyahu states that in a region where a nuclear treaty is in place, putting back the relationship with Turkey is more important than just the natural gas.

Currently the agreement between Turkey and Israel had come to the end as reflected by the authorities. And in the case of a regional alliance composed of Israel, Egypt and Greek Cypriot State, occurrence of an "energy corridor" that is going to secure the energy safety even more will be a subject of discussion.

### **3.2. Russia: The Country Who Wants to Dominate the Energy**

Russia is facing a structure caused by the loss of power and influence after the end of the cold war. Thus her behavior in the global level politics demonstrates herself as the acts of an intermediate level power instead of a big one (Sussex, 2012). Russia's acts both on Ukraine crisis and in Syria and her military presence with acts that can be accepted as irrational is stated to be caused with motives of influence and power, it is obvious that energy is used as a politic power and tool by Russia.

However, these negations mentioned above do not mean that Russia does not take part in the global conjuncture as an actor and she is not active. Russia is the biggest exporter of world in terms of natural gas and oil and the country who possess the most of natural gas reservoirs. When the lands that Russia resides and yet undiscovered energy resources are considered, Russia has a position with the biggest potential in terms of natural gas and oil.

The geography that Russia is located provides also the important advantages on export of current energy and energy politics. They have borders with two of the biggest energy importers of the world. These countries are Europe and China.

After Russia's accretion of Crimean in 2014, debates about the energy import made from Russia and energy security had begun in EU and NATO quarters. Dependence of EU on a huge scale in energy is such as to bear significant results for EU member countries and their citizens (Lidegaard and Bildt, 2014).

When energy is used as the effective means of a politics, it has a vital importance that might affect the possible troubles influencing everything from individuals to all enterprises, the entire social and economic life. The crisis happened between the years of 2006, 2009 and 2013-2014, suggested that EU has major risks regarding the energy safety. It might be said that EU caught off guard to these crises between the two countries about the price disagreement of natural gas. Usage of natural gas as a political weapon or potential of using it that way, was effective in changing the perception in EU about the energy safety (Ozer, 2013: 68-79).

Thus this subject does not only mean that it will affect the Europe's domestic market or global competition, but also the energy politics will determine the safety policies of Europe (Lidegaard and Bildt, 2014). At this point the Eastern Mediterranean energy resources carry a great importance in terms of diversifying the energy supply. However, Russia who does not want to lose her dominion over Europe at first and other countries, has increased her military on large scale presence in the Eastern Mediterranean by using ISIS terrorist organization as an excuse. Because losing the natural gas consumers EU and Turkey first will mean a collapse of Russian economy. The oil prices that started to fall beginning with the midst of 2014, and staying around 40 dollars in the August of 2015, brought the major decrease in the energy incomes of Russia which composes 50% of her budget (Mirinova, 2015).

It might be seen in historical experiences that this kind of economic shocks bring unpredictable consequences upon nation's economies and societies. Then again Russia does not

have product or export diversity that might compensate the energy incomes. Also when the sanction of the West on Russia is considered, Russian economy and budget will face a major pressure and it started to face that pressure (Johnson, 2015).

Russia had succeeded to protect her share in the oil market with the long term export contracts and through following the export projects. However, she has to completely modify the structure of the energy sector in the changing market in order to protect her market share in the natural gas market. Not having access to technology and financing is one of the obstacles in front of the effective operation of energy sector (DePersio, 2015).

When all these aspects are considered, it is obvious that Russia will want to both be an important player in the Eastern Mediterranean natural gas by making partnerships with the countries who have those reservoirs and at least control the energy routes by increasing her military presence in Syria. In the realization of these wish, Israel who didn't put her entire weight on alliance and cooperation subjects in Middle East, who has lobbies and capitals all around the world and her indispensable ally USA's attitudes will be arbiters.

### **3.3. EU and Energy Safety Problem**

Since EU is a foreign dependent country in terms of energy, they focus their foreign policies and strategies mostly on energy supply and diversification, alternative energy resources and energy safety.

When the natural gas became significant in the energy demand of Europe, promoting the natural gas discovery studies in the Eastern Mediterranean, determining the most suitable, the cheapest and the safest energy routes are becoming the sole important aims of EU. Since EU is largely dependent on the natural gas coming from the third world countries, Cyprus as a member country will be a valuable asset with the gas flowing from Israel to Europe. If this happens, the construction of an Eastern Mediterranean corridor will largely provide the energy safety for European Union. (De Micco, 2014).

There is no doubt that energy safety issue carries vital importance for EU. After Russia's accretion of Crimean in 2014, graveness and sensitivity have increased. Because EU's natural gas import is supplied by nearly Russian government company Gazprom in a ratio of approximately 39%. Other 33% comes from Norway and 22% comes from the North Africa.

According to Gazprom, Germany, Poland and NATO member Russia are the biggest importers of Russia in Europe. Germany provides 44% of her yearly natural gas consumption from Russia by importing. Former Soviet Union Republics Estonia, Lithuania, Bulgaria, Slovakia are 100% dependent on Russia in terms of natural gas. EU and NATO member Greece and Czech Republic import 70% of the natural gas that they consume. Only Germany, Austria and Poland of the EU and NATO member countries provide less than 50% of the natural gas that they consume by importing it from Russia (John, 2015).

In February 2015, in an advice published by the EU Energy Union, there are two fundamental reason of energy insecurity in EU. These are especially spaces and import shortages in Middle and Eastern Europe's energy market. (European Council on Foreign Relations, 2015).

EU has saved 2 million Euros in order to develop natural gas reservoirs in the Eastern Mediterranean which will be an important resource for her and to connect the Cyprus natural gas to Europe continent with a pipeline with those reasons. In the case when these aims are reached, an alternative will be created for the natural gas imported from Russia in the ratios above 35%. With the connection of Israeli and Cypriot gas to Europe with a pipeline, is undoubtedly one of the most appropriate solutions. Russia will no doubt try everything to prevent this project. Because Russia is one of the major oil exporters of the world and 50% of her economy depends upon oil and gas export (Cohen, 2016).

Although EU supports the Europe-Asia Eastern Mediterranean corridor for pipeline from Cyprus to Greece and LNG facilities which take part in projects list for 2014-2020, it is faced with Turkey's opposition, lack of investment, high costs and political instabilities. Turkey's opposition to that is caused by the reality of the Eastern Mediterranean corridor might be a competitor to the pipeline that will connect southeast of Turkey with the Eastern Mediterranean (De Micco, 2014).

Nowadays it is observed that USA and Russia is cooperating in the Middle East. Even though it is undecided how long this cooperation will last, it would not be false to say this cooperation includes politics against European Union. Both immigration crisis and crossing the energy paths so to speak by those two countries shows that Eastern Mediterranean natural gas supply which Europe puts her hopes on has some risks. Thus, EU must produce some projects in order to take some precautions.

EU member countries have reached an agreement on new goals including the political goals and targets of EU in the 2020 Strategy Document. According to this agreement (ec.europa.eu-2014):

- i) Greenhouse emission will be decreased at least 40% compared to levels in 1990.
- ii) Decrease in the renewable energy consumption in 27%
- iii) Providing at least 27% energy saving are aimed for.

It is hoped that these goals will help EU to reach her aims of providing a more competitive, safe and sustainable energy system and decrease the long term greenhouse production.

### **3.4. USA and Eastern Mediterranean Policy**

It is not an expected situation that USA as a global power will be indifferent to energy reservoirs in the Eastern Mediterranean and economic and politic effects of these energy resources in the global markets. However, degree and motives of her interest should also be presented.

Although USA Energy Minister Ernest Moniz, reflected the importance they give to the development of the natural gas reservoirs the Eastern Mediterranean during the two days Israel visit for the USA-Israel energy treaty (Zalel, 2016), as once happened, it is known that USA's interest in the energy resources in the Middle East is not very high, now these enormous energy resources tempts USA less and less (Di Faria, 2016). The reason behind that is USA has developed shale gas and thus improved her own oil and natural gas production, and transferred her politic and economic weight to the Asia-Pacific region by improving her relationship with Iran.

When Middle East's importance is considered for USA's energy policy, discoveries of natural gas in Israel and Cyprus will be caught by USA's attention and this is an expected event. Although USA has the biggest potential of being the largest gas producer of the world as a result of the improvement in shale gas production, government sees the Eastern Mediterranean gas as an alternative resource for EU member countries who is dependent on Russian gas. An American private company Noble Energy has played an important part in the discovery process and the company is a shareholder of 40% of Leviathan region, 36% of Tamar region and 70% of Aphrodite region (Karagiannis, 2016: 1-11). However Eastern Mediterranean natural gas has effects on USA energy safety in minimum amounts. None of the major USA oil companies have shown interest in the natural gas developed in Israel, Egypt or Cyprus. In fact, although Noble, the USA Company mentioned above takes part in Eastern Mediterranean as an experience company in searching and

production; it has a status of a midsize company. Its main purpose for the geopolitical interests of USA is to improve the Israel-Turkey relationships and solving the Cyprus problem (Bryza, 2016).

It might be said that USA sees energy as a catalyst in order to redefine the hard and problematic relationships in the entire world, to make new breakthroughs in frozen conflicts.

Based on these facts, USA sees the demand of Eastern Mediterranean for an energy structure as an opportunity (Johnson et al., 2015).

Intimacy between Israel and Turkey and extensive solution of the Cyprus problem will start a strong strategic orbit in the Eastern Mediterranean by reinforcing the harmony of a long Europe – Atlantic society reaching to Levant from USA. And this event will weaken the struggle situation which Russian President Putin took against NATO regarding the Ukraine crisis (Bryza, 2016).

#### **4. The Levant: General Status in the Regional Cooperation**

Competition over the Eastern Mediterranean lands and waters has been going on since the first ages of history. Region perhaps presents the “win-win” scenario for the countries who own the natural gas reservoirs and for the countries who will benefit from those resources.

Even though the energy resources in the region presents important opportunities to the owners and potential consumers, it they also contain risks that might prevent the regional cooperation.

Summarizing these briefly will be useful at this point.

Gas reservoirs found in the region presents major opportunities for regional cooperation and stability in the economic foundation. However, starting with the fact that “opportunities comes rarely and they are spontaneous” (Kissinger, 2015; Wen, 2007), there is an urgent necessity to bring those potential cooperation opportunities to life as soon as possible.

It is apparent that there are tensions, insecurities and conflicts regarding the relationships of the countries who share the Levant borders. There are many problems waiting for solutions in countries such as Israel-Palestine, Israel-Lebanon, Turkey-Greek Cypriot Republic, and Turkey-Egypt-Syria, Israel-Syria. No matter how frequently it is reflected by the supreme authorities that tensions between Turkey-Israel and Southern Cyprus Turkish Republic and Greek Cypriot Republic is about to soften, it shouldn't and it is not expected that all of those problems will cease

to exist from this day until tomorrow. Because problems between some countries (Israel-Palestine, Turkey-Greek Cypriot Republic) are based on long historical roots.

However, natural gas will be able to act as cement in terms of peaceful relationships in an atmosphere full of geopolitical tensions, insecurities and economic unrest that Syria based Middle East has fallen down since the beginning of the Arab Spring.

Although there are some strong and logical indicators economically for the demand of Israel to her neighbors for export and her neighbors to her for import, economic interests do not have priorities over political problems all the time.

Also, because the natural gas market is more changeable and more fragile when compared to oil market, infrastructure studies should be completed with haste even though immediate solutions should be found for the problems between countries and natural gas discoveries should be completed.

Mozambique is getting ready to enter this market with the discovered natural gas reservoirs as the third biggest country of the world in terms of gas, USA embargo has lifted the obstacles on November 2015 in front of export for oil and natural gas export. After the elimination of this obstacle, beginning of the oil and natural gas export to the Europe at the end of February 2016 will have important effects on Russian energy producers (Mironava and Roh, 2016) at first and Eastern Mediterranean's potential export.

In the natural gas markets, excess supply effect might be able to create an increase in competition and most importantly serious effects on the Asia-Pacific Trade Organization. It shouldn't be forgotten that there are natural gas (LNG) exporting projects to the Pacific region from Israel's Gulf of Aqaba and over the Red Sea.

Beginning of USA's delivery of liquefied natural gas (LNG) on 21st April 2016 to Europe, is taken as the first step that will start the gas war coming between USA and Russia. It seems that Russia's dominion over the European natural gas market which she uses as tools in any political issue for Europe and her close neighbors will be pushed back (Tsafos, 2016). USA's entrance to this market will not only get Russian energy market but also potential exporter countries to feel its impact.

## 5. Conclusion

All in all, the vastness of the risks in production and export of the natural gas in the Levant draws the attention. One of the most important obstacles in front of the regional cooperation seems to be as mentioned before, tensions, insecurities and conflicts between regional countries that are caused by historical roots. Apart from that, the subject of how to extract and how to export the product to the consumers is still not clear. Besides, increase in the military presence of USA and especially Russia in the Syria which has a great strategic importance in terms of energy routes with excuse of fighting with ISIS has increased the competition violently. After the military intervention of Russia to Syria, and making long term treaties about discoveries and usage of Energy resources are shouldn't only be assessed as energy related acts but also an attempt to control the energy routes in the Eastern Mediterranean.

One of the obstacles in front of current and potential cooperation between Turkish and Greek governments is the Cyprus problem. Despite some political obstacles, a cooperation based on Turkey's economically logical approach for the Cyprus, will decrease the dependency on Russian natural gas which is highly expensive and politically troublesome. Again, this will contribute to Turkey's goal of becoming an energy center (El Katiri and Fattouh, 2014: 9-15).

Although Cyprus desires to become a regional gas center, hostility and tension between her neighbors including Lebanon and Israel make a tough obstacle. Even though President of Greece, Cypriot leader and Israeli president have signed a treaty accepting the strengthening of cooperation between their countries in the beginning of 2016, it is uncertain what this means in reality (Nakle, 2016). A pipeline to be constructed between Greece and Cyprus will be tough due to rough sea bed between the two countries. If the tensions between Cyprus and Turkey are not eliminated, the construction of the pipeline will become impossible. Also both Israel and Cyprus do not have any infrastructure for natural gas. There are three realistic options for these countries: pipeline, LNG method or combination of them. Yet each option contains geopolitical, technical, commercial, safety and political problems (Karbuz, 2014: 29-39).

Besides sea border disputes between Israel-Palestine, Israel-Lebanon, Israel-Egypt, Turkey-Southern Cyprus are still not solved. Continuum of these disputes, will put the development of the resources at risk and influence the stability of the region much more. These complicated technical geopolitical, political problems, war in Syria, political and social unrest in Egypt, border

conflicts affecting Israel and Lebanon, and Cyprus problems, will affect regional energy production and consumption, and might threaten the vitality of the commercial and energy infrastructures.

Gas discoveries in the last decade show that there will be many more regional and global game changers in the gas markets. Research, development and export speed of the gas reservoirs, each and every decision to be taken by the countries in the Levant, will be the dynamic weighted decisions of the national energy politics and regional politics (Bonafe, 2014: 77-85).

With the performance of the cooperation in the Eastern Mediterranean and establishment of peace and stability between the countries will have many positive regional and global effects, and otherwise near or far, all of the countries will be adversely affected from this event.

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***Dzielenie się zasobami energetycznymi wschodniego regionu basenu Morza Śródziemnego:  
dynamika regionalna i globalna***

***Streszczenie***

Nowoodkryte źródła gazu ustanowiły polityczną i ekonomiczną podstawę do stworzenia regionalnego i globalnego aliansu we wschodnim regionie basenu Morza Śródziemnego. Mimo że owe odkrycia mają potencjał, aby wpływać na funkcjonowanie polityki i gospodarki, to bieżące oraz przeszłe kontrowersje i niestabilność polityczna, sposób dzielenia gazu naturalnego pomiędzy krajami, a także siła konkurencyjna krajów na rynku gazu naturalnego uniemożliwiają produkcję gazu naturalnego oraz badania we wschodniej zatoce Morza Śródziemnego. Z drugiej strony, wskutek poszukiwania gazu w ubiegłej dekadzie, można oczekiwać, że w bliskiej przyszłości istnieć będzie o wiele więcej regionalnych i globalnych graczy we wschodnim regionie basenu Morza Śródziemnego. Badania, rozwój i tempo eksportu rezerw gazu, każda pojedyncza decyzja, która ma być podjęta przez kraje we wschodnim regionie basenu Morza Śródziemnego, będą dynamicznie ważnymi decyzjami narodowych polityk energetycznych oraz polityk regionalnych. Z tego powodu, w niniejszym badaniu skupiono się na wiodących graczach energetycznych we wschodnim regionie basenu Morza Śródziemnego, a także na celach globalnych potęg w odniesieniu do zasobów energetycznych dostępnych w analizowanym obszarze.

***Słowa kluczowe:*** energia, gaz naturalny, gaz łupkowy, wschodni basen Morza Śródziemnego

***Kody JEL:*** Q34, F59, Q48

**<https://doi.org/10.25167/ees.2017.44.2>**