

# The Implications of the Political Events in the Eastern Mediterranean and the Red Sea for Israeli Maritime Trade

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## Introduction

In recent years, the Middle East has experienced a number of processes with significance for Israeli maritime trade, which constitutes approximately 99 percent of the entire volume of Israeli foreign trade.<sup>1</sup> One is the outsourcing and movement of industries eastward to Asian countries, highlighting the essential importance of the Israeli maritime supply chain. A second process concerns the difficulties encountered by the port infrastructure in Israel to meet new demands created by the rapid growth in the size of the ships involved in trade from Asia to Europe. As a result, the transshipment<sup>2</sup> and feeding<sup>3</sup> capabilities of container transshipment hubs in the region have become particularly important to Israel. A third process concerns the anticipated capacity deficiency of hubs in the Eastern Mediterranean resulting from slowed development, due primarily to the hesitation of investors and international operating companies in light of the current regional instability.

Given the crucial importance of the subject, the crisis facing port infrastructure in Israel requires a comprehensive survey. In a nutshell, however, we can say that after considerable efforts on an issue that has been referred to as “a maritime siege” against the state,<sup>4</sup> and although Israel is about to undertake a large scale development of infrastructure within its ports, this new infrastructure will only begin operating early in the next decade. These factors have been defined as strategic threats that

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highlight the sensitivity of Israeli maritime trade and the importance of ensuring its stability.

From a political perspective, storm clouds are gathering above the region – from the eastern ports of Libya to the ports of the Egyptian Delta and the Canal, along the length of the Suez Canal, into the Red Sea, and through the Bad el-Mandeb Strait to the Gulf of Aden – and above other aspects related to the security of world maritime trade in general and Israeli maritime trade in particular. With regard to Israel, these threats include the Arab boycott, which still remains strong; and rapid regional events and fluctuations, which nurture intensifying scenarios of maritime terrorism such as the attack on the vessel *COSCO Asia* as it passed through the Suez Canal nearly two years ago,<sup>5</sup> the attack and loss of an Egyptian military vessel in November 2014,<sup>6</sup> attacks on oil tankers in eastern Libyan ports,<sup>7</sup> and other such developments.

Within the tangled political framework of the Eastern Mediterranean, there are four primary factors with a major impact on maritime trade:

- a. The Arab boycott, in its current state and incarnations, and its impact on Israeli maritime trade.
- b. The events of the Arab Spring, with an emphasis on the instability and weakening of regimes, and their impact on the routes of maritime trade.
- c. Division of the states in the region into three geopolitical blocs, which continue to change dynamically in form and constitution and compete with one another, and which possess dynamic and pliable links to the world powers. The interaction between the blocs has significant impact on issues of maritime trade.
- d. Egypt as a key force: After three years of regime instability, Egypt under the leadership of President el-Sisi is reasserting itself as a regional power. As Egypt is one of the world's most important crossroads of maritime trade, the current and future events there hold great significance for world maritime trade in general, and Israeli maritime trade in particular.

### **The Arab Boycott**

2015 marks the seventieth anniversary of the Arab boycott. Over the years, however, the impact of the boycott has weakened as a result of the US law prohibiting its implementation, Israel's peace treaties with Egypt and Jordan, the Oslo Accords, Saudi Arabia's 2005 entry into the WTO and the consequent termination of its (official) participation in the boycott,<sup>8</sup> Syria's expulsion from the Arab League several months after the eruption

of the civil war,<sup>9</sup> and other such developments. We can learn more about this long term trend from an Egyptian regime official who, early in the current century, noted that “boycotting Israel is something that we talk about and include in our official documents but it is not something that we actually carry out – at least not in most Arab states.”<sup>10</sup> In a League of Nations conference in May 2006, another official publically accused most Arab states of evading implementation of the boycott.<sup>11</sup>

Still, the boycott’s shadow continues to loom over Israel, both in its traditional form and its modern incarnations, such as the campaign by the BDS movement against Israeli activities abroad, which has created pressure on Israeli shipping, as in the case of the sanctions against the ships of the Zim corporation in the United States<sup>12</sup> and the resulting damages. In such an atmosphere, it is clearly difficult for Israeli shipping to find its place in the international cooperative enterprises that today constitute an essential, standard element for all maritime shipping companies that are eager to survive, let alone thrive.

### The Events of the Arab Spring

The Arab Spring began in late 2010 with the wave of violent uprisings that swept through the Middle East – and whose aftershocks are felt to this day. Centralized governments were weakened, regimes were replaced, and leaders were toppled. Libya is currently characterized by government chaos, and in Yemen, the Houthi rebellion has resulted in the collapse of the ruling regime. In Syria, a civil war involving multiple parties has already claimed hundreds of thousands of lives. And in Egypt, after three years of upheaval, increasing regime stability has reemerged under the decisive leadership of President el-Sisi.

The impact of these events on maritime trade stems not only from the disruption and disorder they cause but also, and perhaps primarily, from different acts of terrorism against maritime trade. Incidents such as the attack on the vessel *COSCO Asia* ship as it passed through the Suez Canal,<sup>13</sup> the attack and loss of an Egyptian military vessel off the shores of Damietta in November 2014, the smuggling of illegal immigrants from Libya to Europe in a manner conducive to transport of terrorist operatives and materials, and attacks carried out even before the outbreak of the Arab Spring against maritime vessels such as the oil tanker *M. Star* south of the Strait of Hormuz,<sup>14</sup> the American missile destroyer *USS Cole*, and the tanker *Limburg* off the coast of Yemen<sup>15</sup> have all served to intensify the Shiite/

Houthi/Iranian threat to the Bab el-Mandeb Strait (in scenarios similar to the attack on the Israeli tanker *Coral Sea* in 1971<sup>16</sup>) and the concrete damage to maritime trade from Asia westward, and in particular, to Israel.

In addition, concerns are growing regarding possible terrorism in the eastern and central portions of the Mediterranean, particularly the area off the coast of Libya.<sup>17</sup> These include threat scenarios against energy infrastructure at sea, the disruption of port operations (as has occurred repeatedly in Egyptian ports in recent years), and attacks on ships (such as air attacks on oil tankers while anchored in the eastern ports of Libya, in the context of clashes between Libyan government forces and radical Islamist elements).<sup>18</sup> Each event of this kind has an immediate impact on the stability of shipping in the region, resulting in hikes in maritime insurance premiums, higher ship leasing costs, and the high cost of security for ships and infrastructure facilities in the region.

The impact of such scenarios is already anticipated in the tanker market due to fears of escalation in the Bab el-Mandeb Strait, adjacent to

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Yemen.<sup>19</sup> The passenger ship sector in the region has also been in crisis since the beginning of the Arab Spring, with cruise lines companies cancelling large numbers of cruises out of concern for the security of passengers and a drop in the demand for tourism in the region. Another development has been the flight of investors in port infrastructure, such as the Philippine corporation ICTSI, which abandoned the Tartous port project in Syria,<sup>20</sup> and the investors

in the Dipco terminal at Damietta, who failed to honor their obligations to develop the container terminal in the port and found themselves in a confrontation over the issue with the Egyptian authorities.<sup>21</sup>

### The Impact of Inter-State Dynamics on Maritime Trade

The internal political developments in the Arab world have also influenced inter-state dynamics in the region. In general, three blocs of states are emerging. The first, which can be referred to as “the aggressive traditional” bloc, supports radical Sunni Islam. Prominent in this bloc is Turkey, under the leadership of Erdogan and his neo-Ottoman/pan-Islamic approach, as well as Qatar. This bloc previously enjoyed the support of Egypt under the leadership of the Muslim Brotherhood. However, following Morsi’s

removal from power in July 2013, it has subsequently found itself without a dominant ally.

El-Sisi's rise to power has been indicative of the increasing power of the second bloc, which can be referred to as the "moderate Sunni" bloc (although there can be no mistaking the religious orientation ingrained in this bloc or the aspirations of its leaders regarding hegemony in the Arab world). Consisting primarily of Egypt, Saudi Arabia, Kuwait, and the Gulf emirates, this bloc is currently driven primarily by its concerns regarding the rising wave of Sunni terrorism throughout the Middle East and North Africa and efforts to defend itself in face of this trend.

There are also concerns regarding the growing influence of the third bloc, led by Tehran and comprising Iran and its allies: the Syrian government, the Iraqi government, and Shiite elements in Lebanon (Hizbollah) and Yemen (the Houthis). As part of their efforts to contend with the two other blocs, members of the second "moderate Sunni" bloc are engaged in strategic economic and security investments in Egypt out of a vested interest in its strength. Since the beginning of el-Sisi's rule, such support has exceeded \$30 billion, including the agreements signed at a recent conference in Sharm el-Sheikh.<sup>22</sup> These investments constitute the basis for developing the infrastructure necessary to upgrade the maritime trade activity via the Suez Canal and its environs.

The world powers are "flexible" in their involvement with these blocs. One example is the United States relationship with the aggressive traditional bloc on the one hand, and its efforts to strengthen its relations with the rival moderate bloc and with Saudi Arabia, the leader of the inter-Arab Sunni coalition in Yemen. In the background, the United States is also trying to improve its relations with Iran, which is a bitter rival of Saudi Arabia and is engaged in negotiations with the United States on its nuclear program. Egypt is currently experiencing closer relations with Russia, China, and to a certain extent India as well (a leader of the BRICS bloc, in which Egypt has already expressed an interest),<sup>23</sup> based on diverse economic and military support of Egypt and its plans, including arms deals aimed at strengthening Egypt and sending a clear message to the United States (which has only recently, and only somewhat, eased the weapons embargo imposed on Egypt following Morsi's removal from power).<sup>24</sup> Interesting in the Chinese context is Egypt's enthusiastic willingness to take part in the New Maritime Silk Road project,<sup>25</sup> which includes investments in the Canal project, the existing Chinese partnership in the SCCT terminal in

the northeastern Suez Canal (20 percent) by means of the COSCO Pacific corporation, and more.<sup>26</sup>

The aggressive traditional bloc, along with its failure to oppose radical Islam throughout the region, has been problematic for regional stability. This bloc's approach is expressed in the media it controls, such as the al-Jazeera network in Qatar, its policy of support for organizations such as the Muslim Brotherhood, and other ways. Its approach is one that encourages threats against the maritime supply chain, beginning with the Suez Canal, along the Red Sea, to the Gulf of Aden. This supply chain is dependent on its stability and security, and every shock it experiences has an effect on world maritime trade in general and Israeli maritime trade in particular. The traditional bloc's approach also poses problems for the vision of the Suez Canal Zone, due to the inter-bloc and inter-state tensions regarding events such as the recent cancellation of the agreement on ro-ro ships that operated between Turkey and Egypt, and subsequently Jordan and Iraq (as a substitute for the Syrian route), which despite its negligible practical significance received prominent media focus.<sup>27</sup>

The regional instability, mounting Islamic terrorism, and damage to port infrastructure in the region have undoubtedly had an impact on regional maritime trade. At the same time, this very regional instability provides Israel, with its own stability, certain advantages.

The members of these blocs control essential international water passages. Turkey controls the Bosphorus and the Dardanelles, which are of strategic importance to the countries of the Black Sea. Egypt controls the Suez Canal, which is of great importance to the world as a whole. Through its relationship with the Shiite Houthi rebels in Yemen, Iran has influence over the Bab el-Mandeb Strait. Iran also aspires to control the Strait of Hormuz at the entry to the Persian Gulf, as proven by the recent seizure of the container ship *Maersk Tigris*.<sup>28</sup> This issue highlights the importance of control of the strategic maritime passages dominating world and local supply chains such as the Bosphorus and the Dardanelles, which control the maritime supply chain to and from the countries of the Black Sea, and the Bab el-Mandeb

Strait in the southern Red Sea, which controls the maritime access of Saudi Arabia, Eritrea, Sudan, and Jordan, and is important for world maritime trade via the Suez Canal. With regard to Israeli maritime trade, Israeli cargo in trade to and from Asia is typically transported by international shipping companies, so that any scenario of practical injury to Israeli

maritime trade requires injury to global trade, with all the international implications of such a scenario.

### **Egypt as a Special Case**

Egypt is of particular importance to Israeli maritime trade. Following the onset of the events of the Arab Spring, Mubarak's rule ended, and Mohamed Morsi of the Muslim Brotherhood rose to power. Morsi's rule was short-lived, and his regime was toppled in July 2013. General Abdel Fattah el-Sisi was sworn in as the president of Egypt in June 2014, the most difficult period in the history of modern Egypt, given the country's crumbling economy, 10 percent inflation, a stock market that lost 40 percent of its value over a period of two years, foreign currency reserves that had fallen 65 percent, a rising unemployment rate (15 percent), the disappearance of tourism, and dwindling foreign investment.<sup>29</sup>

El-Sisi was also forced to contend with foreign matters, most of which had an impact on maritime trade. For various reasons, among them the Qatari connection with the Muslim Brotherhood and criticism of the Egyptian leader in the Qatari media, el-Sisi clashed with the emir of Qatar to the point of ejecting all Qatari interests from Egypt, including investments, which in Egypt were perceived as a Morsi-supported Qatari attempt to seize control of the Suez Canal.<sup>30</sup>

To the south, the crisis intensified with Ethiopia, which started to execute its plans to dam the Blue Nile. These plans were of major significance for Egypt, where the Nile constitutes an essential lifeline. As a result of the diverse Israeli aid to Ethiopia, which some in Egypt perceive as an Israeli plot, radical Egyptian politicians were heard threatening to prohibit the passage of Israeli shipping traffic through the Suez Canal. To the west, Egypt borders eastern Libyan ports such as Darna and Hariga, in a region where Egypt has experienced bitter clashes with radical Islamist groups such as the Libyan Ansar al-Sharia, which rely on the sympathy of the Muslim Brotherhood. In the east and in the northern Sinai Peninsula the regime is fighting an obstinate struggle against Ansar Bayt al-Muqdis, which has pledged its allegiance to the Islamic State, and in the Canal region, it has been forced to contend with the al-Furqan organization, which was behind the attack on the vessel *COSCO Asia*.

In this situation, after assuming the presidency in June 2014, el-Sisi began taking steps to curb the civil, economic, and security chaos in Egypt, and quickly informed his people and the world of the updated infrastructure

project for the Suez Canal Zone Project, which would begin expanding the Canal immediately.<sup>31</sup> He branded the project as a unifying national symbol, and highlighted its significance through heightened media amplification and superlatives drawn from Egyptian history. He also addressed the national sentiment of the Egyptian people with a call to purchase investment certificates to help fund the project, which met with an enthusiastic response. El-Sisi secured the Egyptian military's backing of the challenging project by charging it with responsibility for the phase of Canal expansion. In this way, he positioned the army on the public agenda as the people's army, in a manner that ensured the army's commitment to the project, as well as a suitable response to any attempt to damage the project.<sup>32</sup>

The expansion process, and particularly the intention to double the Canal's income in the future, has caused a sense of unease in the world shipping community, which is currently in the throes of economic crisis. It is abundantly evident that the scope of maritime traffic will not change in a substantial manner beyond the organic growth of maritime trade, raising concerns regarding a possible hike in transit fees aimed at recouping the development investment. In addition, a scenario in which the expansion phase delays the development of container terminals, particularly those in the northern Canal, would be problematic for regional shipping and Israeli maritime trade in particular, due to the deficiency in port infrastructure that is expected to emerge in the coming years and the resulting problematic scope of transshipment and feeding that is expected to characterize the region during the period in question.

What, exactly, does the Suez Canal Zone Project entail and what is its framework for implementation, particularly with regard to maritime trade? The project is supposed to take approximately twenty years to complete and require an estimated investment of approximately \$200 billion. Overall, it calls for the creation of an urban axis based on logistical services derived from Canal activity, including the development of modern land and maritime agriculture, energy infrastructure, water desalination, and tourism. The project will begin with the expansion of the Canal in order to facilitate two-way traffic and reduce the amount of time that ships need to wait for passage. This will significantly shorten the time it takes for ships to pass through the Canal and make the canal more attractive by providing shipping services.

Later, in the northern Canal, plans call for the expansion of ports and development of the region as Egypt's primary trade gateway and

chief transshipment hub, through development of platforms capable of accommodating a capacity of twelve million containers and additional cargo, to be operated over approximately 25 kilometers of berths. The planning includes a free trade zone, industry, and logistical centers covering an area of some 100 square kilometers. In the south, it will include substantial development of the port at Ain Sukhna, which will serve as the southern Egyptian gateway to the ports of the Gulf, East Africa, and Asia. The development will include the construction of berths, industrial zones, logistical areas, and diverse shipping services, including expanded ancillary shipping activity in the Suez ports, Port Tawfik, and Adabiya.

The project will include the digging of six tunnels beneath the Canal and the expansion of the cities of Kantara and Ismailia. It will also involve the building of New Ismailia City, Bardawil City, and other new cities aimed at the urban development of the Canal route as a region of development for the future of Egypt, including as a migration destination and a solution for the increasing population density in Egyptian cities. The project, which in part will serve as a replacement of sorts for the traditional agricultural economy of the Nile Valley, is expected to create approximately one million jobs over the next fifteen years.

There can be no doubt about the project's importance for the State of Israel. For the most part, Israel will benefit from the economic and transportation-related advantages of its close proximity to the Suez project, based on aspects of regional models of the emergence of economies of agglomerations. In other words, Egyptian economic development will lead to Israeli economic development, particularly in relation to maritime trade and its byproducts. The Suez project is geared toward the development of unprecedented port infrastructure and ancillary shipping services in the region in a manner from which the Israeli economy only stands to benefit, as long as the issue is dealt with correctly and in a supportive manner. Also relevant is the issue of regional security and the advantages to Israel of a neighboring ally with an identical interest in the development and establishment of a reliable and secure supply chain.

## Conclusion and Recommendations

Although the boycott of Israel appears to be eroding and has gone from being an "action item" of the Arab League to an issue dealt with by individual countries, its importance must not be underestimated. The boycott is alive and well in the consciousness of world shipping, as well as in its modern

incarnations such as the BDS movement. This links directly to the boycott's impact on Israeli maritime trade, including how ships are able to visit Israeli ports, and the resulting impact on prices, options, and flexibility of the Israeli maritime supply chain.

Although it is still too early to fully understand the impact of the Arab Spring, the regional instability, mounting Islamic terrorism, and damage to port infrastructure in the region (including the fears of investors and other phenomena disrupting routine maritime logistics) have undoubtedly had an impact on regional maritime trade. At the same time, this very regional instability provides Israel, with its own stability, certain advantages, as reflected in the success of international tenders for the construction and operation of new container ports. The construction of these ports and the adaptation of existing ports to the requirements of world maritime trade is a necessary step, especially in light of the geopolitical sensitivities in the region and as a suitable response to the anticipated pressures on the port infrastructure in the Eastern Mediterranean, which also hold significance for the needs of the State of Israel.

In the realm of inter-state politics, rapid and typically unanticipated regional changes create consistent tensions, such as those in the current relations between Turkey and Egypt, Saudi Arabia and Iran, and other countries, some of which have shifted from the inter-state level to the inter-bloc level. At higher levels, the identification of a global power with one bloc or another raises concerns regarding the possible intrusion to the local level of tensions between powers and interests outside the region, in addition to undesirable effects on regional and Israeli maritime trade, particularly with regard to the security of the maritime passages in the region and the capacity to operate port infrastructure in the region.

With regard to Egyptian-Israeli relations in the maritime realm, it is clear that despite the strategic partnership between Egypt and Israel on various issues, Egypt cannot be expected – whatever the threat to its ports, to the Suez Canal, or even to free movement in the Red Sea and its straits – to turn its back on rival Arab interests when it comes to threats against Israeli maritime trade. However, it is also clear that the direction in which el-Sisi is moving today and the challenging trajectory of Egypt's development, which is an Egyptian interest, is simultaneously of essential and desired strategic importance for the stability of the Israeli supply chain and Israeli maritime trade.

Within the storm currently raging in the Levant, which shows no signs of abating, Israel today is characterized by relative stability. In terms of maritime trade, however, this situation is misleading. Israel's lack of preparedness in terms of the existence and efficiency of port infrastructure may very well result in a decline in Israel's connectivity to global trade, which is why it is essential to adapt this infrastructure to a suitable international level. Such a level will ensure Israel its warranted position as a neighbor of the transportation projects constructed in the region, such as the new Chinese Silk Road, the free trade zones and ancillary shipping service along the Suez Canal route, and others, in a manner that benefits the entire Israeli economy in the realm of exports and imports alike, as well as possible cooperative efforts with the massive economic activity that can be expected from the Suez Canal project. The anticipated regional development, particularly surrounding the Suez Canal, offers an unprecedented window of opportunity throughout the entire scope of activities in the maritime realm, including the intensive activity surrounding the natural gas industry. These areas of development will require and facilitate regional maritime cooperation that must be cultivated, primarily due to the region's ever apparent massive economic potential, particularly with regard to the maritime industry. Israel must take all measures necessary to avoid missing this unique – and elusive – geopolitical occasion, as well as the sense of opportunity and regional undertaking with possible partners, some of which have significantly softened their tone of opposition to any cooperation with Israel.

## Notes

- 1 "Report of the Commission for Socioeconomic Change," Jerusalem, October, p. 176.
- 2 Transshipment refers to the unloading of cargo at a hub port from ship A and its loading onto ship B for the sake of transporting it to its final destination.
- 3 Feeding refers to the act of transporting the cargo in transshipment from the hub port to the final destination.
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