



Regional power competition in the Eastern Mediterranean: the return of naval power and the changes technology brings

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Summary

- Top-tier technology items manufactured mostly by the US aeronautical industry are either too expensive or are restricted to local actors; as a result, Israel and subsequently Turkey have developed indigenous capabilities over the last few years, which are highly exportable.
- Even though the Russian invasion of Ukraine and the war now raging in the country has to some extent overshadowed the rising tensions in the East Mediterranean (which culminated in the standoff between the Greek and Turkish fleets between August and November 2020), there are still issues that need to be resolved which stem directly from the military build-up and the power balance, which has been seriously disturbed.
- Greece is already invested in catching up in terms both of numbers and technological capabilities. Nonetheless, to date, these efforts have failed to close the gap for two main reasons: Firstly, the agreements signed so far include little or no transfer of technology and know-how; Secondly, the local capabilities in both ship building and the aeronautical industry suffer from the perennial Greek state maladies.
- Investing in local AI technologies and solving the “Gordian knot” of the shipyards are prerequisites for developing local infrastructure capable of competing regionally in the long run.

Introduction

Another emerging trend in recent years has been the territorialization of maritime zones. This is undoubtedly connected to energy games, but not limited there. It is also connected with the foreign policy posturing of countries like Turkey, which in some cases views maritime zones as areas of exercising sovereignty.

As will be highlighted below, in terms of their UAV field capabilities, Israel is the local champion, while Turkey is an emerging power, with the other regional actors lagging behind.

In the last decade, a series of developments in the broader region of the East Mediterranean have changed the geopolitical landscape: the inglorious resumption of the “Arab Spring” in Egypt and the crushing of the Muslim Brotherhood, the civil war in Libya, the bloodbath in still chaotic Syria, the collapse of the state in Lebanon, an attempted coup in Turkey in 2016 that led to ever more aggressive regional behavior with an Islamist-nationalist twist are just a few of the most important developments. To comprehend the bigger picture, it should be noted that over the same period, energy matters—offshore natural gas, in particular—became a factor in potential cooperation, but also conflict. Another emerging trend in recent years has been the territorialization of maritime zones. This is undoubtedly [connected to energy games](#), but not limited there. It is also connected with the foreign policy posturing of countries like Turkey, which in some cases views maritime zones as areas of exercising sovereignty.

This paper focuses on the multibillion-dollar armaments race entered into by the main actors in the East Mediterranean, and how it affects foreign policy. The two main areas of concern are, first, the Naval pillar, but also the technology pillar, primarily with regards to the production and use of Unmanned Aerial Vehicles (UAVs) and, second, the related disruptive Artificial Intelligence (AI) technology that is altering the 21st-century battlefield. Countries of focus for this brief are the littoral states of the East Mediterranean, and primarily Greece, Turkey, Egypt, and Israel. Libya and Syria are mentioned, though with a caveat on the credibility of the official data and figures, since these war-torn countries continue to be operational theatres for foreign forces, mainly controlled by Turkey and Russia. Cyprus is also a distinct case, since the southern part of the island constitutes an internationally recognized state, while the northern part, occupied since 1974, is the base for a non-negligible Turkish military presence. According to data from open sources (such as the official data provided by the national defense authorities of the countries in question) and *The Military Balance 2021* report published by the International Institute for Strategic Studies (IISS), the littoral nations¹ of the East Mediterranean have quite diverse fleets in terms of capabilities and technology. As will be highlighted below, in terms of their UAV field capabilities, Israel is the local champion, while Turkey is an emerging power, with the other regional actors lagging behind.

Naval Power

The following data are focused on surface units and submarines, but it should be noted that Turkey and Egypt mainly, and to a lesser extent Israel and Greece, have Naval Aviation elements that can provide extensive reconnaissance of a possible operational theatre. These elements will not, however, be examined in the current paper.

Greece

The Hellenic Navy (HN) has a fleet of 13 Principal Surface Combatants (PSC), which in this case are frigates. Nine of these are Dutch Kortenaer Batch 2 (Elli-class), and four are German MEKO 200 (Hydra-class). The HN began to bring Elli-class frigates into active service in the late 1970s, while Hydra-class vessels were incorporated into the fleet between the late 1980s and 1999. The lengthy discourse on the need to modernize the PSC fleet was disrupted during the fiscal consolidation programs that followed the collapse of Greek public finances. In September 2021, in an attempt to modernize the PSC fleet and gradually withdraw its Elli-class frigates, the Greek government reached an

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agreement with its French counterpart to procure 3 FDI class frigates, to be built by the “Naval Group” in Lorient, France. The three ships will cost a total of 3.23 billion euros and the first two are scheduled for delivery in 2025. Greece has also announced an interest in procuring new corvettes for another two billion euros. It is not yet clear whether this latter amount includes the cost of modernizing the HN’s four Hydra-class frigates. Currently, British, US, Italian, French and Dutch proposals are on the table and, according to statements made by Prime Minister Kyriakos Mitsotakis, final decisions will be made [before the end of summer 2022](#). The HN fleet also includes four Papanikolis-class (German type 214) Air Independent Propulsion (AIP) submarines, one modernized Poseidon-class (German type 209/1200) fitted with AIP technology, three Poseidon-class (type 209/1200) and three Glafkos-class (German 209/1100) vessels. In total, the HN can deploy 34 patrol and coastal combatants of various types, including missile boats, (Super Vita, La Combattante IIIB, La Combattante III, Tiger, Osprey and NOR Nasty), three minehunters (2 Hunt, 1 Osprey), five amphibious landing ships, 15 landing craft and 25 logistics and support vessels. To replenish its fleet, Greece has agreed to procure three used Island-class littoral vessels from the US Coast Guard, and 6 Alkmaar-class minehunters from the Royal Dutch Navy.

Egypt

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The Egyptian Naval Forces (ENF) have undergone a major upgrade, especially in the last few years, which is an indication of Cairo’s desire to project power in the East Mediterranean. This is evident in the ENF’s PSC fleet. In recent years, the ENF has acquired three FREMM-class frigates (one French and two Italian) to add to the six it already had (4 Oliver Hazard Perry and 2 Knox-class of US origin). It has also started building and developing four Gowind 2500 corvettes (France) alongside older types of corvettes (one Pohang-class [South Korea] and two Descubierta-class [Spain]). The ENF can field eight submarines (four type 033 [China] and four modernized type 209/1400 [Germany]), as well as 53 patrol vessels, coastal combatants including missile boats of various types (Ambassador MK III, Molniya, October, Type 024, Osa II, Ramadan, Combattante IIA, Type 062 and Type 037). The ENF can deploy 14 minehunters (T-43, Natya, Osprey and Dat Assawari types), 12 landing ships, and one for logistics and support. The ENF had recently added two Landing Helicopter Docks (LHD) of the Mistral class (France) to their capabilities, and retain a fleet of six landing craft. That Cairo is willing to invest more in order to expand the capabilities of the ENF is clear from the interest [Egypt recently expressed in purchasing Barracuda](#)-class submarines that were originally to have been exported by Naval Group (France) to Australia.

Israel

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The discovery of offshore natural gas has also pushed Israel, a country with no significant naval tradition, to slowly but steadily increase its capabilities. The Israeli Naval Corps (INC) can now deploy a fleet of seven corvettes (4 Magev and 3 Eilat class) and eight missile boats of the Hetz class. The INC can also field a total of six Dolphin and Dolphin II-type submarines (Germany), fitted with AIP technology. The INC forces also include two support ships (Type 765) and 39 patrol combatants. Two of these patrol combatants are “Rafael Protector” Unmanned Surface Vehicles (USV) designed primarily to counter terrorist threats.

Turkey

Turkey has one of the most diverse fleets in terms of both origin and type, while part of it is Turkish manufactured.

In general, Turkey is committed to increasing the footprint of its domestic arms industry by gradually integrating Turkish-made missiles into all TNF ships (ATMACA, manufactured by RoketSan). The Turkish Presidency of Defense Industries (SSB) have also announced that domestic mass production of Unmanned Surface Vehicles (USV), will be able to begin in 2022.

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The Turkish Naval Forces (TNF) can deploy 16 frigates in total, eight of which are MEKO 200 (Germany) and eight Oliver Hazard Perry (US) class. It can also field ten corvettes (6 French d'Estienne d'Orves and 4 Turkish MILGEM) and 19 missile boats in total. The TNF's submarine capabilities include 12 units in total (4 type 209/1200 and 8 type 209/1400), all made in Germany; six type 214 AIP submarines (Reis class) are also being built in the Golcuk shipyards. The first vessel has already been delivered, while the remaining five are scheduled to be commissioned by 2027. The TNF also have 18 mine warfare vessels in total, plus an impressive 32 landing ships. The TNF also use two AKAR-type replenishment oilers. The TNF have also developed two Intelligence ships designed to conduct SIGINT (Signal Intelligence) and ELINT (Electronic Intelligence) operations. Turkey is also developing the TCG Anadolu, an LHD platform based on Spanish technology, which is also currently under construction in Istanbul shipyards. Even though TCG Anadolu was initially designed to carry helicopters into a potential theatre of conflict, it seems that the TNF has authorized modifications that will enable the installation of [Bayraktar TB3 UAV platforms, instead](#). In general, Turkey is committed to increasing the footprint of its domestic arms industry by gradually integrating Turkish-made missiles into all TNF ships (ATMACA, manufactured by RoketSan). The Turkish Presidency of Defense Industries (SSB) have also announced that domestic [mass production of Unmanned Surface Vehicles \(USV\)](#), namely the ULAQ project, a joint venture between ARES Shipyard and Meteksan Defense, will be able to begin in 2022.

Republic of Cyprus, Illegally Occupied territories in Northern Cyprus, Syria, Lebanon and Libya

The East Mediterranean's remaining littoral states have rather limited Naval Forces, or none at all. The Cyprus Naval Command (CNC) has 21 small patrol boats of various kinds. Theoretically, the Lebanese Sea Forces (LSF) deploy 10 patrol boats and two landing ships. Even less reliable are the data for the Syrian Arab Navy (SAN): after years of war and the entrenchment of the Assad Regime, the SAN's naval assets have depreciated considerably. Most of its Soviet-era ships are either defunct or exist in a deteriorating condition, meaning that the SAN can now deploy 13 Osa Class missile boats, 20 patrol combatants, two landing ships, and six minehunters. Prior to 2011, the Libyan Naval Forces (LNF) could deploy a fleet of 29 ships in total (3 missile boats, 25 patrol combatants and 1 landing ship), but during the civil war most of these units were either damaged and not repaired and in most cases abandoned. Finally, Turkish-occupied Northern Cyprus has 27 patrol and missile boats.

Unmanned Aerial Vehicles (UAV) in the East Mediterranean

The use of UAVs has become increasingly important, especially in terms of conducting Intelligence, Surveillance and Reconnaissance (ISR) operations. The technology involved in developing these airborne platforms is not expensive, but it is significant. Top-tier technology items, manufactured in the main by the US aeronautical industry, are either too expensive or are restricted to local actors. As a result, in recent years, Israel and subsequently Turkey have developed domestic capabilities, which are highly exportable.

Israel

Israel maintains a very strict policy on who it shares sensitive information about its arsenal with. Nonetheless, the Israeli Air Force (IAF) deploys a wide range of UAVs capable of conducting both ISR and bombing missions. The IAF can deploy an unspecified

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number of locally-produced UAVs, like the [HERON](#) TP (Eitan), HERON-1, Hermes 900 (more than 22) and Hermes 450. A number of older types of UAVs developed by Israel Aerospace Industries (IAI), like the RQ-5A, are still in service, while the IAF also uses Harpy loitering munitions. First and foremost, in addition to a weapon and an ISR operations tool, Israeli UAVs have contributed significantly to Israel's defense exports, which have risen [at an annual rate of at least 5%](#) in recent years. That the domestic Israeli drone and UAV industry is lobbying the government to drop restrictions applied through the Missile Technology Control Regime (MTCR) is telling. Even though drones and UAVs accounted for [some 6% of Israel's 8.3 billion dollars](#) of defense exports in 2020, the local industry is probably feeling the heat from another regional actor which is becoming increasingly competitive in both price and capabilities: Turkey.

Turkey

The Turkish Armed Forces (TAF) were one of the first importers of Israeli technology, having deployed HERON and Harpies for years. Nonetheless, in the last few years Baykar Tech, the local industrial aeronautical champion, and also Turkish Aerospace Industries (TUSAS), have developed a series of highly efficient UAV systems for use by the TAF, which they [also export to a number of countries](#). The development of capabilities, as well as the number of UAVs operated by the Turkish Airforce (TuAf), Turkish Land Forces (TLF), the TNF, and also the Gendarmerie is growing. According to the latest calculations, [close to 200 UAVs are currently deployed by the three branches of the TAF plus the Gendarmerie](#). The majority are type TB-2 Bayraktar, while the TNF operate at least 28 ANKA-S types, and a smaller number of Gnat 750 and, as mentioned above, Israeli HERON. Baykar Tech has also produced the sophisticated Akinçi type, a High-Altitude Long-Endurance (HALE) UAV with far more lethal capabilities than the TB-2 that are already deployed by the dozen by the TAF. Three "Akinçi" type units have been integrated into the TAF, but the war in Ukraine may have put their production at risk, since the engines were [produced by the Ukrainian MotorSich company](#) on the outskirts of Zaporizhzhia, a city transformed into a theatre of war by the Russian invasion of Ukraine.

Besides the capabilities it provides to the TAF, the domestic UAV and drone program provides Turkey with an export success story. The Bayraktar TB-2 has been sold to Ukraine, Qatar, Azerbaijan, Poland, Morocco, Turkmenistan, Ethiopia and [Kyrgyzstan](#), while discussions are underway in relation to potential exports to Niger and Albania. Some estimate that the Turkey's 3.2 billion dollars in defense exports, [700 million](#) dollars come from the sales of drones and UAVs. Some analysts are already proposing an export policy containing a [moral code of conduct](#), since [Turkish-made UAVs have been used in conflicts](#) that most definitely involved the loss of civilian life. Thus, Turkish drones have been used in Nagorno Karabakh and Libya, but also by Ukrainian forces against Russian invading forces since February 24, 2022. The effectiveness of the Turkish-made TB-2s deployed by the Ukrainian forces cannot [be assessed](#) until reports of their [effectiveness](#) on the battlefield can be confirmed.

Egypt

Egypt's regional ambitions also manifest themselves in UAV procurement and development. The Egyptian Armed Forces (EAF) can deploy an array of UAVs procured from the US and China, along with drones from the UK. However, the Egyptian arms industry has also expended considerable effort on developing indigenous [UAVs and target drones](#), and four more types of indigenous drones and UAVs are being developed. Currently, for surveillance, the EAF use RQ-20B Puma AE II (USA), ASN-209 (China), AI-

Saber (Camcopter S-100, built in the UAE), Wing Loong I (China), Adcom Yabhon Flash 20 “Ejune-30 SW” (UAE), and Meggit Banshee (UK). Most of the older types, like the R4E-50 SkyEye (USA) and TR-324 Scarab (USA), have been decommissioned.

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Cyprus has purchased a batch of four Israeli IAI Aerostar UAVs at a cost of 13 million dollars, reportedly to monitor the waters in its Exclusive Economic Zone (EEZ).

Greece

The story of the UAVs deployed by the Hellenic Armed Forces (HeAF) is similar to what was reported above for the surface fleet of the HN. Even though the Hellenic Army and Airforce were among the first to use UAVs almost 20 years ago, the fiscal crisis of 2010 cancelled both investments, along with talks aimed at developing UAVs domestically. The [UAV Squadron](#) of the Hellenic Air Force (HAF) was established in 2003, and since then two batches of the Greek-designed Pegasus I and Pegasus II UAVs have conducted ISR missions. Nonetheless, having been initially designed in the early 1980s, the Pegasus UAVs now lag behind in technology and capabilities. The same is true of the four French Sperwer UAVs that still fly for the Hellenic Army. The need for ISR operations in the Aegean led to a lease contract being signed for [two Israeli HERON](#) systems based on the island of Skyros. In a recent interview, Nikos Panayiotopoulos, Greece’s Minister for National Defense, stated that his government has requested [UAVs from the US Armed Forces](#), without specifying the types or the method of purchase (i.e. direct purchase, or through Foreign Military Funding or Pentagon Excess Defense Articles programs). It should be noted that, back in 2019, Greece was interested in leasing two [MQ-9A Reapers](#) occasionally based at the 110 Combat Wing Airforce Base in Larissa.

Syria, Libya, Lebanon and Cyprus Republic

Of these four countries, only Syria and the Republic of Cyprus have recorded UAV capabilities. According to the *Military Balance 2021* report, in 2021 the Syrian Armed Forces operated Mohajer III and Mohajer IV medium UAVs, along with Ababil-type light UAVs, all of which are designed and built in Iran. Cyprus has purchased a batch of four Israeli [IAI Aerostar](#) UAVs at a cost of 13 million dollars, reportedly to monitor the waters in its [Exclusive Economic Zone](#) (EEZ). Even though Turkish TB-2s have seen active service in Libya, especially when [the LNA Forces](#) took on the advancing armies of General Khalifa Haftar, the platforms were almost certainly operated by Turkish Armed Forces staff.

Conclusions & Proposals

Littoral states in the East Mediterranean have evidently embarked on an arms race which combines the traditional need to project power at sea with a parallel tendency to invest in UAVs which, by contributing to ISR operations, can help strengthen control over a state’s maritime domain. For Turkey, the [“Mavi Vatan” \(Blue Motherland\)](#) doctrine resonates in efforts underway to build stronger naval capabilities. In the cases of Egypt and Israel, the main purpose is to guarantee that offshore natural gas drilling and exports can continue unhindered, though Egypt must also project its role as a regional power in various directions, but primarily towards Turkey, which is behaving as an increasingly assertive actor in the East Mediterranean. Turning to Greece, the need to invest is mostly focused on safekeeping national interests in the Aegean, as well as on projecting European force in the region through the further strengthening of ties with traditional defense partners like the USA, but mostly now with France.

Even though the Russian invasion of Ukraine and the war now raging in the country has to some extent overshadowed the rising tensions in the East Mediterranean (which culminated in the standoff between the Greek and Turkish fleets between August and

November 2020), there are still issues that need to be resolved which stem directly from the military build-up and the power balance, which has been seriously disturbed.

Greece is already invested in catching up, in terms both of numbers and technological capabilities. Nonetheless, to date, these efforts have failed to close the gap for two main reasons: First, the agreements signed so far include little or no transfer of technology and know-how; Second, the local capabilities in both ship building and the aeronautical industry suffer from the perennial Greek state maladies (defunct shipyards with a complex legal status, and inefficiency stemming from an inability to create synergies between the state and private sectors). Evidently, investing in local AI technologies and solving the “Gordian knot” of the shipyards are prerequisites for developing local infrastructure capable of competing regionally in the long run. However, it should be noted that the competition is already very fierce, since Israel and Turkey already [export, respectively, 8 and 3 billion dollars’ worth of locally produced defense equipment annually](#) (2021).

This context necessitates a simultaneous and profound change in the philosophy and structure of Greek military academies in all branches. Finally, the EU’s decision to increase defense funding has presented Greece with a golden opportunity to finally modernize its existing military capabilities while creating new ones, especially in the areas of interest to the Hellenic Armed Forces, which are focused on the maritime domain. .

¹ The International Institute for Strategic Studies, *The Military Balance 2021, Annual assessment of global military capabilities and defense economics*, London 2021