

# THE LEBANESE-ISRAELI MARITIME AGREEMENT: IS IT A CONFLICT RESOLUTION MODEL OR A GEOPOLITICAL STOPGAP?

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## Abstract

The 2022 US-mediated maritime delimitation agreement between Lebanon and Israel marked a significant technical achievement, resolving an 860 km<sup>2</sup> overlap in the Exclusive Economic Zone (EEZ) and enabling future offshore gas exploration. This article examines the domestic political and economic factors in Lebanon and Israel that facilitated the settlement. It assesses the roles of external actors, particularly the United States, the EU, and the UNIFIL, in shaping and supporting the agreement. Drawing on conflict resolution theory, including models of ripeness, interest-based negotiation, conflict management and transformation, the analysis reconstructs the negotiation process and examines the implementation obstacles. It argues that, although the agreement represents a successful technical compromise, persistent domestic gridlock in Lebanon, limited enforcement mechanisms, and investor hesitation have delayed drilling and reinforced Israel's asymmetric benefits. The absence of multilateral frameworks or maritime security protocols further limits the agreement's potential as a model for broader cooperation in the Eastern Mediterranean. The article concludes that durable peace and stability will require accelerated Lebanese energy development, institutionalized EEZ coordination and formal maritime security arrangements.

**Keywords:** *Lebanon, Israel, delimitation; border dispute; maritime diplomacy; Eastern Mediterranean*

## Introduction

In October 2022, Lebanon and Israel, technically still at war since 1948 and without diplomatic relations, signed a US-mediated agreement to delimit their maritime boundaries and pave the way for hydrocarbon exploration in the contested offshore waters. The treaty settled an 860 km<sup>2</sup> overlap claim to the Exclusive Economic Zone (EEZ), awarding Israel full rights to the Karish field and Lebanon to its adjacent Qana field, often referred to as Block 9. At the same time, Lebanon agreed to pay

Israel a share of the small portion of Qana that extends south of the new line. Although this arrangement unlocked the prospect of gas revenues, it was conceived as a temporary economic and political measure, rather than a pathway to comprehensive peace.

The roots of this dispute date back to the early 2000s, when Eastern Mediterranean states began concluding EEZ agreements to secure offshore resources. Lebanon's 2007 deal with Cyprus never came into force due to domestic political deadlocks and regional sensitivities. In contrast, Israel's 2010 Cyprus agreement created an overlapping area 17 km south of the line claimed by Lebanon. The 'Line 23' submitted by Lebanon to the United Nations (UN) in 2011 was promptly rejected by Israel, and a compromise proposal by the United States in 2012, the so-called 'Hof Line',<sup>1</sup> also failed to gain acceptance, leaving negotiations stalled for nearly a decade.

During this interruption, the discovery of large gas fields (Tamar and Leviathan) intensified competition and gave new urgency due to Lebanon's economic crisis. By 2020, renewed indirect US mediation helped reconcile Lebanon's revenue needs with Israel's interest in resource security, ultimately resulting in a technical settlement in 2022. Despite the settlement, regional tensions persist, ranging from Lebanon's domestic political paralysis to wider rivalries in the Eastern Mediterranean.

Based on this background this paper seeks to answer the following research questions: (1) What domestic and external forces shaped this technically focused bilateral deal? (2) To what extent can such a narrowly scoped settlement generate broader regional stability? The primary analysis deliberately focuses on the bilateral negotiation process, the core objectives of the signatories, and the immediate challenges of implementation, while also highlighting potential channels – such as its precedent-setting role for other EEZ negotiations or its signalling effect to non-signatories – through which the agreement may influence broader Eastern Mediterranean dynamics.

Drawing on conflict resolution theory, particularly ripeness theory (Zartman, 2009), as well as conflict management, transformation, and interest-based negotiation models, the paper links each theoretical variable (mutually hurting stalemate, negotiation leverage) directly to the case study. It then applies Levinger's (2013) conflict assessment and conflict mapping tools to structure the analysis of actor preferences, power dynamics, and negotiation pathways. The qualitative analysis draws on secondary sources – including official statements, UN reports, press coverage, and academic literature – to reconstruct the negotiation process and

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<sup>1</sup> The proposed Hof Line envisaged a division of the disputed area into 490 km<sup>2</sup> for Lebanon and 370 km<sup>2</sup> for Israel. The proposal was rejected by both parties.

assess both the bilateral outcomes and the conditions under which regional spillover effects may arise.

## Theoretical framework

This study focuses on four complementary conflict-theoretical strands. First, the ripeness theory, which posits that negotiations become possible when both parties find themselves in a “mutually hurting stalemate”, whereby the costs of continuing warfare outweigh the benefits of an agreement (Zartman 2009). Between 2019 and 2021, Lebanon’s real GDP declined by more than 20 percent, and its currency lost approximately 90 percent of its value (World Bank, 2021), while Israel faced domestic political pressure to unlock new gas revenues amid an export plateau (Azhari, 2020). This dual economic impasse formed the “mutually hurting stalemate” that prepared both governments for US-mediated indirect negotiations and helps explain why the final treaty was strictly limited to EEZ coordinates and hydrocarbon royalties and excluded land boundaries or security clauses.

Second, interest-based negotiation emphasises how negotiators leverage concrete incentives (carrots and sticks) to shape settlement terms (Fisher & Ury, 1981). In this case, US sanctions relief, World Bank credit lines, and EU technical assistance served as levers that closed the final impasse.

Third, conflict management theory emphasizes confidence-building measures that contain risks without necessarily tackling their root causes (Wallensteen 2002). In practice, the extension of UNIFIL’s<sup>2</sup> Maritime Task Force (MTF) mandate and the decision to hold indirect talks in Naqura reduced the likelihood of incidents at sea and protected the domestic political legitimacy of the respective governments (UNSC, 2022; TRT<sup>3</sup>, 2021). However, as the actor mapping (Figure 1) below shows, these precautions proved insufficient to overcome Hezbollah’s red lines; therefore, licensing on the ground was postponed until additional protocols for “security wiring” were negotiated.

Fourth, the transformation theory advocates the establishment of institutions and standard norms as prerequisites for lasting peace (Lederach 1997). The absence of a multilateral coordination forum for the EEZ or a common infrastructure mechanism in the 2022 agreement highlights its purely technical nature. Without a regional platform analogous to the East Mediterranean Gas Forum (EMFG) or formal agreements in the security sector (such as naval hotlines or joint exercises), the treaty remains a one-off demarcation and not a catalyst for stability in the wider region (Nakhle, 2023).

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<sup>2</sup> The United Nations Interim Force in Lebanon (UNIFIL) was established in 1978 to oversee the withdrawal of Israeli forces from southern Lebanon, restore peace and support the Lebanese government in extending its authority in the region.

<sup>3</sup> In this research, Türkiye Radyo ve Televizyon Kurumu will be referred to as TRT.

These four theoretical approaches are not applied in isolation but form an inter-related continuum that reflects both the sequencing and layering of conflict resolution processes. Ripeness theory provides the initial condition for negotiation, identifying when parties reach a mutually hurting stalemate that renders continued confrontation more expensive than compromise. Interest-based negotiation theory explains how actors capitalize on this ripe moment by leveraging material incentives and political trade-offs to shape the content and direction of the agreement. Conflict management theory operates in parallel, focusing on immediate mechanisms, such as confidence-building measures and third-party facilitation, that mitigate risks and facilitate the negotiation process despite unresolved hostilities. Ultimately, conflict transformation theory encompasses a longer-term, structural layer that extends beyond tactical fixes, emphasizing the need for institutional frameworks, shared norms, and multilateral mechanisms to achieve sustainable peace. In the context of the Lebanon–Israel agreement, this integrated approach helps explain how a technically successful negotiation can advance without deeper structural transformation, and why, in the absence of institutional and security arrangements, the deal remains vulnerable to reversal or regional irrelevance.

To operationalize these theories, I utilize Levinger's conflict assessment and mapping tools to depict the preferences, deal-breakers, and interactions of individual actors (Levinger, 2013). This combined model sheds light on how the deal design and incentives emerged from the specific negotiation dynamics and provides a structured basis for assessing the likely impact on the Eastern Mediterranean as a whole.

## Key Events In the Lebanese–Israeli Maritime Dispute

Lebanon and Israel have technically remained at war since 1948 and have not formally recognized land border despite the Israeli withdrawal from southern Lebanon in 2000 and the establishment of the Blue Line<sup>4</sup> by the UN (Kiwan, 2020; Barak, 2017). The ongoing hostility, characterized by regular military clashes, notably the 2006 war<sup>5</sup> and the renewed hostilities between Hezbollah and Israel in 2024<sup>6</sup>, significantly limited direct bilateral dialogue (Israel Policy Forum, 2025).

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<sup>4</sup> The Blue Line is the border drawn by the UN between Lebanon and Israel, which was established in 2000 to confirm the Israeli withdrawal from southern Lebanon. It is not an official international border but serves as a reference for monitoring the ceasefire.

<sup>5</sup> The 2006 Israel–Hezbollah War lasted 34 days, ending under UNSCR 1701 on 14 August 2006; it caused over 1,000 Lebanese and around 165 Israeli fatalities, displaced roughly one million Lebanese and half a million Israelis, and led to the deployment of UNIFIL alongside Lebanese forces south of the Litani River.

<sup>6</sup> The renewed hostilities in 2024 were based on the attacks that Hezbollah began on October 8, 2023, and which it promised to continue as long as Israel's war on Gaza continued. It culminated in a ceasefire brokered by the US and France under UNSCR 1701 on November 27, 2024.

The discovery of substantial offshore gas reserves in the Levant Basin around 2010 transformed the dispute into a contest over hydrocarbon wealth between the two countries. The US Geological Survey estimates recoverable gas reserves at 122 trillion cubic feet and 1.7 billion barrels of oil (Knell, 2013). In 2007, Lebanon and Cyprus reached a maritime boundary agreement that Beirut never ratified. In 2010, Israel concluded its own EEZ agreement with Cyprus. When Lebanon submitted its 'Line 23' coordinates to the UN in 2011, they overlapped the Israeli line by 860 km<sup>2</sup>, prompting Lebanon to warn that any Israeli exploration would violate its sovereign rights (Monsour, 2011; Nakhle, 2023).

In 2012, US mediator Frederic Hof proposed an equidistance compromise, but this was rejected by both parties, leaving the dispute dormant for eight years. Sporadic threats from both sides underline the risks of a unilateral approach. In October 2020, under the auspices of US Special Presidential Coordinator Amos Hochstein and with UNIFIL's facilitation, Lebanon and Israel initiated indirect technical talks at Naqura, Lebanon. By limiting negotiations to EEZ coordinates and revenue sharing, and explicitly excluding clauses on land borders or normalization, both sides avoided a domestic political setback (TRT 2021, Nakhle 2025). Lebanon initially attempted to extend its claim to 1,430 km<sup>2</sup>, citing the historical demarcation lines of Ras al-Naqoura. Israel countered with a strict proposal for a median line (Hayatayan, 2021).

Europe's 2022 energy crisis, triggered by Russia's invasion of Ukraine, intensified Western interest in extracting natural gas from the Eastern Mediterranean. A new dynamic led to a breakthrough on 24 February 2022. On October 27 2022 the parties exchanged letters, mediated by the US, agreeing on a single EEZ boundary from starting Ras Naqoura, assigning Karish to Israel and Qana to Lebanon, with a 40% side-royalty on Qana's overlap<sup>7</sup> (Fakry 2023; UN, n.d).

## **Domestic Drivers and Constraints: Lebanon**

Lebanon entered negotiations in the context of a deepening financial crisis. Between 2019 and 2021, real GDP declined by over 20%, the Lebanese pound lost more than 90% of its pre-2019 value, and the poverty rate increased to over 80% of households (World Bank, 2021). These indicators were not only a sign of economic hardship but also created a significant "hurting stalemate" that Zartman (2009) identifies as a precondition for fruitful negotiations. In practical terms, the Lebanese leadership could not postpone talks or demand far-reaching political concessions. Therefore, unlocking offshore gas revenues became the only viable path to rapid budget relief.

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<sup>7</sup> Israel received full rights to explore the Karish field estimated at 2.4 trillion cubic feet (68 billion cubic meters), while Lebanon obtained exclusive rights to the Qana field but agreed via a side-agreement with TotalEnergies to share royalties on the portion extending beyond the agreed border (Offshore, 2022).

This necessity explains why the text of the 2022 agreement focuses on the delimitation of the EEZ and not on broader territorial or diplomatic issues (UN, 2022).

Simultaneously, Lebanon's sectarian consociational system, split between the 8 March and 14 March parliamentary blocs<sup>8</sup>, has long hindered coherent policymaking. Since the October 2019 protests, lawmakers have been deadlocked on the issue of revenue sharing, and successive caretaker cabinets (2020-22) have lacked the mandate to ratify a border agreement (Azhari, 2020; Berman, 2021). In this frozen political climate, the formal adoption of a maritime treaty requires not only a parliamentary quorum but also the tacit approval of Hezbollah. Hezbollah has publicly rejected any normalization with Israel (MESP, 2022). This forced the negotiators to seek only a "technical" settlement without any political clauses or side agreements on land borders.

Concurrently, the widespread street mobilizations sparked by the uprising in October 2019 and exacerbated by the explosion at the Beirut port in August 2020 demanded a high level of responsiveness from the government (Azhari 2020). Any impression that the heads of government are "selling out" to Israel could reignite mass unrest. The decision to limit the talks to the demarcation of the EEZ and postpone the normalisation debates thus served a dual purpose: it addressed pressing economic grievances while avoiding the politicized optics that could fracture Lebanon's fragile social cohesion (Haboush, 2019; Azhari, 2020).

## **Domestic Drivers and Constraints: Israel**

Israel's push to conclude a technical maritime delimitation agreement was shaped primarily by pressing domestic political and economic considerations. Between March 2020 and November 2022, Israel held four elections, resulting in fragile coalition governments under pressure to deliver economic "wins" amid the COVID-19 downturn (Azhari, 2020; Reuters, 2022). This electoral volatility generated a "hurting stalemate" of its own: without new revenue sources, ruling coalitions risked collapse. Major energy companies, notably Noble Energy (now Chevron Corporation) and TotalEnergies, seized this moment and lobbied hard for clear legal boundaries to justify billions of dollars of offshore investment (Knell 2013). Their expertise shaped the negotiation agenda and pushed them towards a purely "technical" delineation of the EEZ without side agreements or security provisions.

Simultaneously, Israel's security apparatus described control of the seas as crucial for deterrence in the north. The Northern Command and the Ministry of Defence calculated that denying Hezbollah a share of potential gas royalties would

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<sup>8</sup> Lebanon's consociational system allocates key offices and parliamentary seats along sectarian lines among 18 recognized religious communities and its politics are dominated by two rival blocs: the pro-Syrian March 8 Alliance and the anti-Syrian March 14 Alliance.



undermine the militia's financial base and strengthen Israel's strategic position. Both for domestic energy needs and for expanding exports to Egypt and Europe (Hafner, 2022). In line with interest-based negotiation theory, the double economic and security gain intensified Israel's negotiating demands, including strict adherence to the equidistance principle and no concessions that could be portrayed as weakening its maritime strategic depth (Daily Star, 2020).

Public opinion in the country was largely in favour of an agreement that would solidify Israel's reputation as a reliable energy supplier. However, hardline factions in the Knesset warned against perceived territorial concessions (OECD, 2025). This forced negotiators to avoid ambiguous language or broader political clauses, a dynamic I observe in the analysis of the 2022 treaty text, which is limited to the exchange of coordinates and explicitly excludes security or diplomatic normalization.

However, the maritime deal also encountered resistance from Israel's domestic political landscape. Right-wing factions in the Knesset, including members of the Likud and Religious Zionism parties, publicly criticized the agreement for what they perceived as territorial concessions to an enemy state. Some argued that acknowledging Lebanon's claim over parts of the Qana prospect set a dangerous precedent that could weaken Israel's negotiating position in future border disputes. Prime Minister Benjamin Netanyahu called the agreement a "surrender to Hezbollah", while others framed it as undermining Israel's deterrence posture (Keller-Lynn, 2022). Although the Bennett-Lapid government avoided formal ratification in the Knesset by classifying the deal as a non-binding exchange of letters, this manoeuvre attracted legal challenges and media scrutiny in Israel. These internal dynamics constrained negotiator's ability to include more ambitious political or security clauses and reinforced the preference for a narrowly technical framework focused solely on EEZ demarcation.

Together, these electoral imperatives, industry lobbying, security calculations, and public sentiments created a political environment in which a US-mediated, technically narrow agreement emerged as the only viable path.

## **Great Powers and the Regional System**

The 2022 Lebanese-Israeli maritime agreement did not emerge in a vacuum. It was shaped by external actors whose interests and interventions helped bring both parties to the negotiating table and shaped the contours of the final deal. Among these, Washington's main objective was to strengthen Lebanon as a buffer against Iranian influence by helping Beirut tap into much-needed gas revenue (Kiwani, 2020). The US envoys tied progress in the Naqura talks to concrete economic incentives, including targeted sanctions relief for Lebanese officials and the facilitation of loan packages (Fitch Ratings, 2022). This carrot-and-stick approach created the "ripeness" that Zartman (2009) considers necessary for a breakthrough in negotiations.

By insisting on indirect, face-saving talks instead of direct Israeli-Lebanese dialogues, the US also preserved domestic political cover for both governments and ensured that the final deal remained limited to the EEZ coordinates, excluding any clauses on diplomatic recognition or security cooperation (UN, 2022; Times of Israel, 2022).

Unlike other regional energy arrangements, such as the EMGF, which includes Egypt, Israel, Cyprus, Greece, Italy, Jordan, and the Palestinian Authority, the Lebanon–Israel agreement remains entirely outside any multilateral institutional framework. This reflects Lebanon’s non-membership in the EMGF and the lack of political normalization between the two signatories. As a result, the deal cannot benefit from regional infrastructure planning, coordinated export frameworks, or collective security mechanisms that EMGF participants have developed. The absence of such institutional linkages reinforces the technical and ad hoc nature of the agreement, limiting its potential as a replicable model for other unresolved EEZ disputes in the region and beyond.

The EU’s support for Eastern Mediterranean gas as an alternative to Russian supplies translated into technical assistance and conditional funding under its Neighbourhood Policy. Brussels required demonstrable progress in EEZ delimitation before releasing portions of its energy-sector aid, effectively reinforcing the US strategy of economic leverage (Hafner, 2022; European Commission, 2022).

Although UNIFIL’s Maritime Task Force (MTF) is mandated solely to assist the Lebanese Navy in preventing the illicit importation of weapons by sea, it played a mediating role in negotiations at sea. UNIFIL provided logistical support and a secure location at its base in Ras al-Naqoura for the US-brokered talks in October 2020 and May 2021 and hosted the signing ceremony on 27 October 2022 (UNIFIL, 2025). While UNIFIL did not receive a new mandate for border demarcation, this practical support and visible presence strengthened the purely “technical” framework of the talks. They helped build the minimum trust both sides needed to move the deal forward.

Ankara, embroiled in its own EEZ disputes with Nicosia and Athens, publicly downplayed the Lebanese–Israeli talks to avoid weakening its position but quietly examined the US precedent for possible use in its negotiations (Bryza, 2020). Egypt welcomed any reduction in regional volatility that could lower its import costs but refrained from overt intervention to maintain balanced relations across the Eastern Mediterranean (Knell 2013).

Rather than intervening directly in Lebanese–Israeli negotiations, Moscow opted to deepen its strategic alignment with Syria. In March 2022, Gazprom signed an agreement with Damascus to explore offshore waters that overlap with Lebanon’s claimed EEZ. This implicitly challenges Beirut’s maritime sovereignty (Berman, 2021). While this move lacks immediate operational follow-through and can be seen as symbolic, it nonetheless serves a spoiler function by complicating Lebanon’s



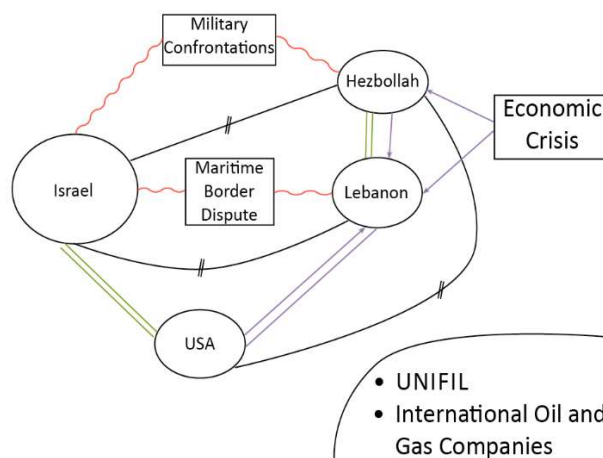
energy prospects and signalling Russian resistance to US and EU-backed energy realignment in the region. In the context of broader East-West tensions following Russia's invasion of Ukraine, such posturing allows Moscow to assert its influence in the Eastern Mediterranean without direct confrontation, while bolstering its status as a strategic partner of Syria and a counterweight to Western-supported initiatives.

Taken together, these external dynamics not only created the incentives and safeguards necessary for a bilateral technical agreement but also prevented any ambitions for multilateral normalization. The text of the agreement reflects these calibrated external pressures in its exclusive focus on EEZ coordinates and revenue-sharing mechanisms (UN, 2022; Times of Israel, 2022), setting the parameters for my subsequent assessment of whether such a narrowly defined agreement can generate lasting regional spillover effects in the following manner.

## Conflict Actor Mapping

The 2022 Lebanon–Israel maritime delimitation agreement was not formalized through a single signed treaty, but rather through a series of letters and annexes exchanged via US mediation, fulfilling the customary international law requirements of written form, mutual consent, and entry into force on the specified date (Fakry, 2023). Each government sent its acceptance to Washington, which then issued a notice of entry into force. This arrangement reflected both parties' need for political cover and the central mediating role of the United States. The Conflict Actor Map below (Figure 1) depicts the web of alliances, disputes, and influences that shaped the implementation.

**Figure 1: Lebanon Israel Maritime Border Dispute Conflict Map (2021)**



Own editing, data source: Ismail, 2021: 50.

The 2022 Lebanese–Israeli maritime agreement unfolded against a backdrop of complex alliances, disputes, and external influences, which are summarized in the conflict map above. Circles represent the leading actors (Lebanon, Israel, Hezbollah, and the USA), squares represent external factors (economic crisis and military confrontations), and semicircles represent secondary actors (UNIFIL and international oil and gas companies). Straight lines with "≠" indicate no relationships; red zigzag lines indicate active disputes or confrontations; green double lines mark formal alliances; black single lines denote structured relations; and arrows represent influence. Against this relational backdrop, implementation ran into predictable frictions:

### ***Lebanon's Sectarian Gridlock***

The 8 March vs. 14 March divide left the Chamber of Deputies without a quorum to ratify the treaty for nine months (Yiallourides & Ioannides, 2024). Only a side deal guaranteeing TotalEnergies a share of the Qana royalties broke the deadlock, enabling the licensing of Block 9 in January 2023.

### ***Israel's Technical Rigidity and Hostile Context***

Israel aligned closely with the US (green double line), its cabinet approved Chevron's Karish drilling permit but postponed full operational clearance until credible security guarantees were in place (Cicurel, 2022). Behind this caution lay not only standard equidistance disputes but also a sustained coercive diplomacy campaign by Hezbollah between June and October 2022 (Sobelman, 2023). Hezbollah openly threatened all of Israel's gas production and even risked a full-scale war if Karish came online unilaterally, marking an unprecedented escalation in their conflict (Sobelman, 2023). Faced with these overt threats and private signals, drones were launched toward Karish and intercepted anti-ship rockets. This echo of coercive diplomacy forced repeated technical consultations through late 2023, underscoring how enduring wartime hostilities (straight "≠"), lack of diplomatic ties, and fear of Hezbollah's reprisals shaped Israel's risk-averse, rule-bound approach to maritime development.

### ***Hezbollah's Security Veto and Hostilities***

Although not formally recognized by the US and Israel (straight "≠"), its alliance with Lebanon (green double line) has allowed it to impose a condition on the "security wiring" (Kiwan, 2020). Public threats against oil rigs (red zigzag to Israel) and behind-the-scenes demands forced additional security protocols brokered by UNIFIL, further delaying exploration (Cicurel, 2022). Between June and October 2022, Hezbollah combined public threats. Hezbollah warned that all Karish rigs were in its crosshairs and set a strict September deadline for extraction to begin, using covert signals such as reconnaissance drones over the field (Sobelman, 2023). This "ticking

clock” ultimatum compelled Israel to abandon its 45% carve-up proposal in favour of Lebanon’s demand

### ***US Mediation Format***

US envoys made progress on targeted sanctions relief to Lebanon (arrows) and accelerated World Bank loans, approximately \$200 million contingent on initial gas flows (World Bank, 2022), but its insistence on indirect talks (no line) protected domestic audiences at the expense of trust building for joint safety procedures.

### ***UNIFIL’s Enforcement Gap***

Although UNIFIL’s Maritime Task Force was mandated solely to assist the Lebanese Navy in preventing the unauthorized entry of arms by sea, it played a crucial role in facilitating Lebanon–Israel maritime talks. Beginning in October 2020 and again in May 2021, UNIFIL provided a secure venue at its Ras al-Naqoura base for US-mediated negotiations and hosted the formal signing ceremony on 27 October 2022 (UNIFIL, n.d.). While its mandate does not include boundary demarcation, UNIFIL’s logistical support and visible presence helped create the minimal trust and stability, or “confidence-building”, necessary for two technically hostile parties to agree on EEZ coordinates. As the mission itself notes, these maritime breakthroughs may presage longer-term progress on land, aligning with its broader objective of laying the groundwork for enduring peace.

### ***Investor Caution***

After receiving the license to explore the Qana block in June 2023, TotalEnergies – along with its partners Eni and QatarEnergy – deployed the Transocean Barents platform to Block 9 in August. However, the installation of the first exploration well, originally scheduled for May and later rescheduled for August 2023, was postponed due to unresolved safety protocols and delays in Lebanese ratification (Szymczak, 2023). Each postponement led to an increase of around 15% in projected development costs, undermining both Lebanese and Israeli expectations for near-term revenues and highlighting how geopolitical and procedural uncertainties can stall even well-financed energy projects.

## **Potential Regional Spillovers**

Although the Lebanese–Israeli maritime agreement represented a historic bilateral breakthrough, it has had only a limited stabilizing impact on the Eastern Mediterranean. First, it only covered a single 860 km<sup>2</sup> overlap, leaving unresolved EEZ disputes between Lebanon and Syria, Cyprus and Turkey, Greece and Egypt, and Libya and Egypt (Nakhle, 2023). Unlike the previous trilateral framework between Israel, Cyprus, and Egypt, which led to the establishment of the Eastern

Mediterranean Gas Forum, this agreement does not include a mechanism for institutionalized multilateral coordination, thereby limiting its potential demonstration effect on regional border negotiations.

The economic outcomes were similarly mixed. Lebanon relied on the first gas flows to attract foreign investment and help prevent a devastating fiscal collapse, characterised by a 20% drop in GDP and an 80% increase in household poverty by 2021 (World Bank, 2021). However, as of mid-2024, exploration in the Qana block has not yet begun (Kataeb, 2025), while Israel has already increased its exports to Egypt and Jordan (Scheer, 2025; Times of Israel, 2025). This asymmetry risks strengthening Israel's influence in the energy sector and deepening Lebanon's economic vulnerability, undermining any narrative of mutual benefit that might encourage further cooperation.

A comparative example further highlights the limitations of the Lebanon–Israel agreement. The trilateral coordination among Greece, Cyprus, and Israel, anchored in the institutional framework of the EMGF, has enabled these states to jointly develop pipeline infrastructure, coordinate export routes, and engage in limited security cooperation (Bogdanos, 2025). This model illustrates how energy diplomacy can generate both economic and geopolitical dividends when embedded in multilateral structures. In contrast, the Lebanese–Israeli agreement, which lacks institutional support or security provisions, remains an isolated and fragile arrangement. Its purely bilateral nature means it cannot leverage regional momentum or contribute meaningfully to broader conflict transformation in the Eastern Mediterranean.

Security dynamics further complicate this picture. The Eastern Mediterranean remains a volatile theatre: tensions in the Aegean continue to flare up, the rivalry between Iran, Israel, and the US is simmering, and the Gulf states are vying for influence (IISS, 2023). The escalation in the Gaza Strip since October 2023 and the Hezbollah–Israel war in 2024 have shown that a purely “technical” delimitation of the EEZ, which explicitly does not contain any security or coordination clauses for maritime shipping, cannot protect offshore infrastructure from regional hostilities or investor nervousness.

Taken together, these factors suggest that the 2022 agreement functions as a temporary stopgap, rather than a permanent framework for regional peace. To achieve real spillover effects, a future architecture would need to combine (a) accelerated Lebanese drilling to offset economic gains, (b) a multilateral EEZ coordination forum involving Cyprus, Egypt (and possibly Turkey), and (c) formalized security sector measures, such as joint maritime surveillance protocols and naval hotlines to guard against military flare-ups. Without these complementary elements, it is unlikely that the Lebanese–Israeli agreement will go beyond its bilateral and technical framework and further promote stability in the Eastern Mediterranean.

## Conclusion

This study examined the 2022 Lebanon–Israel maritime delimitation agreement through the dual lenses of conflict theory and empirical analysis, answering two core questions: (1) What domestic and external forces shaped this technically focused bilateral deal? (2) To what extent can such a narrowly scoped settlement generate broader regional stability?

I find that Lebanon’s acute economic collapse and Israel’s electoral security calculus led to the very “mutually hurting stalemate” that the ripeness theory predicts, driving both governments into US-brokered indirect negotiations that prioritized hydrocarbon revenues over all other considerations. Confidence-building measures, UNIFIL maritime observers, and a strictly technical negotiating format smoothed the adoption of the process but failed to address deep-seated security concerns or sectarian red lines. The exclusion of multilateral coordination mechanisms and any security or normalisation clauses confirms that this agreement was intended as a one-off technical solution rather than a step towards comprehensive conflict transformation.

Implementation has remained fraught: parliamentary gridlock in Beirut, Hezbollah’s and Israel’s security-related remits, limited UNIFIL enforcement, and investor caution have delayed drilling and eroded anticipated economic benefits, particularly for Lebanon. Meanwhile, Israel has advanced its gas exports, underscoring the asymmetrical gains that risk undermining the deal’s credibility as a model for equitable cooperation.

Consequently, the 2022 treaty’s capacity for regional spillover is constrained. Without expedited Lebanese exploration, a multilateral EEZ platform, and formalized security sector protocols, similar agreements are unlikely to catalyse lasting stability in the Eastern Mediterranean. This highlights the need for institutionalized mechanisms, such as the EMGF or a new UN-backed maritime coordination platform, to serve as forums for future EEZ conflict mitigation, infrastructure planning, and the development of shared security protocols. Future research should assess whether incremental institution-building, perhaps via the EMGF or targeted confidence-building exercises, can transform technical delimitations into durable peace dividends. For policymakers, the key lesson is that technical boundary agreements must be embedded within broader economic, diplomatic, and security frameworks to move beyond temporary patches and contribute meaningfully to regional peace.

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