POLICY OUTLOOK

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A New Era of Middle Eastern Connectivity: Opportunities and Challenges

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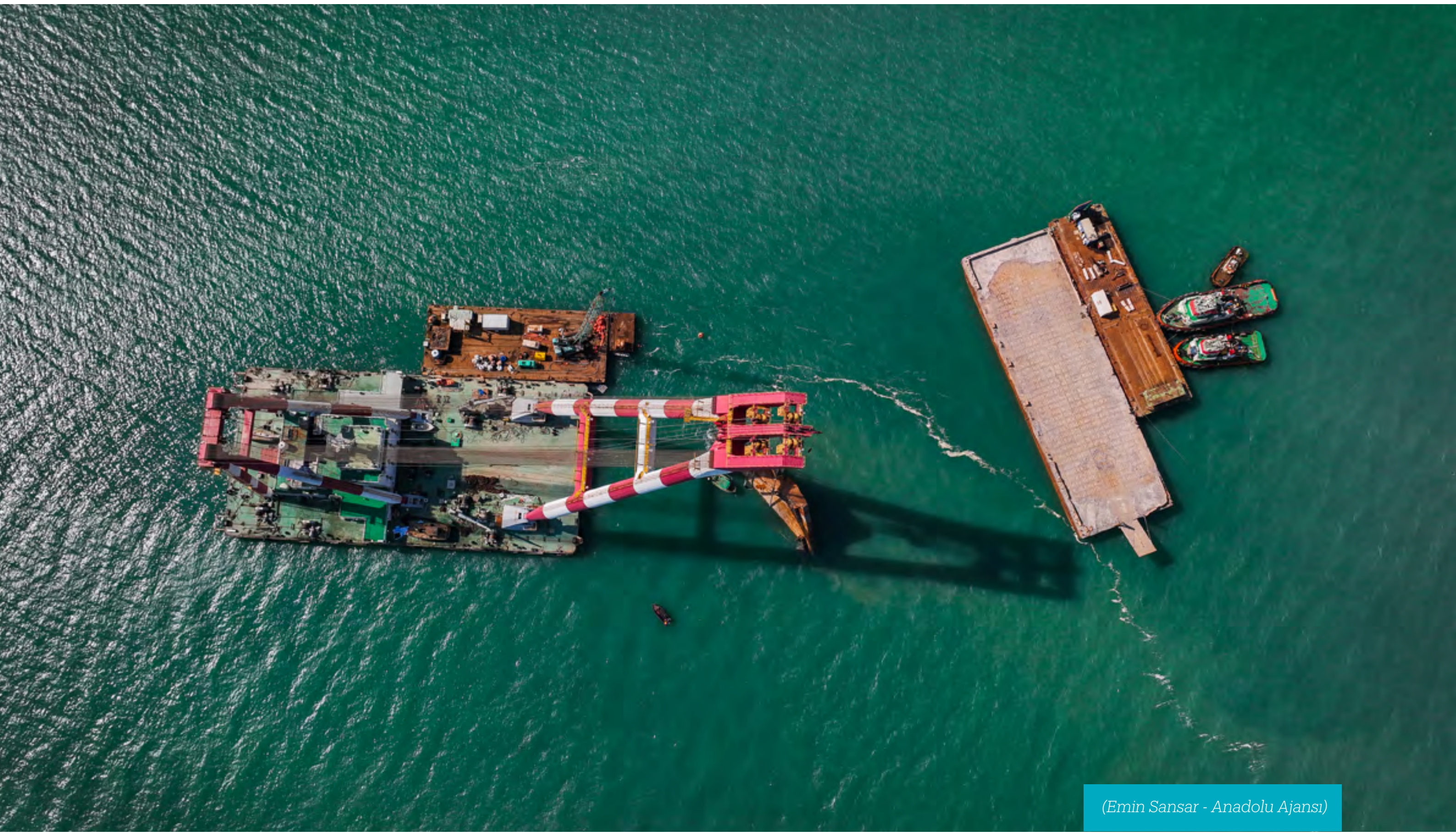
(Emin Sansar - Anadolu Ajansı)

The Middle East stands at a crossroads, where shifting power dynamics, economic ambitions, and strategic connectivity are redefining the region's future. The fall of Syria's Baath regime has upended decades-old balances, pushing regional powers to recalibrate their strategies. Türkiye has emerged as a decisive player, shaping Syria's reconstruction while positioning itself as a key energy and trade hub. Meanwhile, great power competition and evolving alliances are reshaping Washington's engagement, particularly as Trump's return to the White House signals new uncertainties. This Policy Outlook delves into the forces driving regional connectivity—trade corridors, energy infrastructure, and Eastern Mediterranean transport routes—highlighting Türkiye's role in an increasingly contested yet interconnected landscape.

Introduction

The Middle East is undergoing a period of profound transformation, driven by shifting geopolitical alignments, intensifying global power competition, and the growing importance of regional connectivity. Trade corridors, energy infrastructure, and post-war reconstruction efforts are increasingly shaping the region's economic and political landscape. As middle powers assert greater influence, securing access to strategic trade routes and energy resources has become a priority for both regional and global actors. These developments underscore the Middle East's evolving role as a critical hub in global connectivity networks.

Recent geopolitical shifts have further altered regional dynamics. The collapse of Syria's Baath regime after six decades in power has upended long-standing power balances, compelling regional actors to reassess their strategic priorities. While Iran and Russia—historical backers of Assad—have faced significant setbacks, Türkiye has emerged as a key player in shaping Syria's post-war trajectory. Former U.S. President Donald Trump underscored this shift, describing Türkiye as holding the "key to Syria" following the opposition's victory. Meanwhile, in the final days of the Biden administration, a ceasefire in Gaza sought to stabilise the region after 15 months of Israeli assaults, yet Trump's controversial proposal to expel Palestinians from their land casts uncertainty over lasting peace efforts. With Trump's return to the White House, new dynamics are expected to shape Washington's approach to Iran and Arab-Israeli normalisation.

In this evolving geopolitical setting, regional connectivity has emerged as a decisive factor in shaping economic cooperation, security, and diplomatic realignments. This Policy Outlook examines the opportunities and challenges associated with Middle Eastern connectivity, particularly emphasising trade corridors, energy exploration, and transportation in the Eastern Mediterranean—an area rich in natural gas reserves. At the heart of this analysis is Türkiye's potential to establish itself as a regional energy hub and a crucial node in global connectivity networks, reinforcing its strategic significance within the Middle East's shifting geopolitical and economic architecture.

Competing Corridors: CPEC, IMEC, and Development Road

China-Pakistan Economic Corridor (CPEC)

The shift toward a multipolar global order and the increasing prominence of middle powers have made trade corridors a critical arena of geopolitical competition. In this context, China has undertaken a strategic initiative through the Belt and Road Initiative (BRI), prioritising infrastructure development and connectivity. One of the most significant components of this vision is the China-Pakistan Economic Corridor (CPEC), which seeks to establish a direct link between Xinjiang and Pakistan via rail, ultimately

(Elmurod Usubaliev - Anadolu Ajansı)

granting China access to the Indian Ocean through Gwadar and extending its reach to the energy-rich Gulf. This corridor is also a key mechanism for mitigating China's Malacca Dilemma, which could leave Beijing vulnerable to energy supply disruptions in the event of a U.S.-led blockade during a Taiwan crisis. Furthermore, CPEC aligns with the Gulf states' economic diversification strategies, opening avenues for deeper economic collaboration. Despite sustained attacks by terrorist organisations such as the Balochistan Liberation Army (BLA), Tehreek-i-Taliban Pakistan (TTP), and Tehreek-e-Jihad Pakistan (TJP) on CPEC's critical infrastructure in Balochistan, China has remained committed to the project. Beijing continues to advance its implementation under a strategy best described as "moderate progress with caution."

India-Middle East-Europe Corridor (IMEC)

Conversely, at the 2023 G20 Summit, then-U.S. President Joe Biden announced the India-Middle East-Europe Economic Corridor (IMEC), a large-scale connectivity and infrastructure initiative. Designed to connect India with the Mediterranean via maritime routes through the UAE and Bahrain before extending overland through Saudi Arabia, Jordan, and Israel's Haifa Port, IMEC was conceived as a counterweight to China's BRI ambitions. However, the outbreak of the Israel-Hamas conflict on October 7, 2023, reshaped the geopolitical landscape, significantly affecting the corridor's feasibility. Israel's intense bombing campaign in Gaza led to regional spillover effects, escalating tensions between Israel and Iran through a series of Hezbollah-led clashes. Additionally, Houthi forces in Yemen launched a series of attacks on commercial vessels in the Red Sea, severely disrupting maritime security. Some of these attacks extended as far as the Indian Ocean, leading to a 900% increase in war risk premiums, further destabilising regional trade routes. As a result, the IMEC project, already in its early conceptual stages, has been rendered largely theoretical due to the prolonged instability affecting key transit nodes.

Despite these setbacks, stakeholders have maintained a commitment to IMEC's development. French President Emmanuel Macron appointed Gérard Mestrallet as a special envoy to oversee France's engagement with the initiative, while India and the UAE have continued to strengthen their economic and logistical cooperation. Additionally, efforts to renovate key railway infrastructure in northeastern Arabia have persisted. While the security risks that emerged after October 7 have somewhat diminished following the Gaza ceasefire and increased diplomatic pressure on Iran, IMEC's long-term feasibility remains uncertain. The new Trump administration might adopt a more supportive stance toward the corridor, potentially injecting new momentum into the initiative. However, no publicly available comprehensive feasibility study has been conducted on IMEC, particularly in relation to its financial costs and potential trade benefits. As a result, despite continued diplomatic interest, the corridor remains a largely conceptual project, with its viability contingent on evolving U.S. strategy in the Middle East. Recently, President Trump, during an official visit of Indian PM Modi, renewed the U.S. commitment to the IMEC project by featuring it as "one of the greatest trade routes in history".

When assessing the future of the India-Middle East-Europe Economic Corridor (IMEC) through the lens of Gulf geopolitics, it is essential to consider the Saudi factor. Among the key stakeholders in IMEC are Saudi Arabia and the United Arab Emirates (UAE)—two regional rivals engaged in a broader power competition. The UAE holds significantly greater strategic importance within the project from a maritime connectivity perspective due to its extensive port infrastructure and hinterland network. In contrast, Saudi Arabia primarily serves as an intermediary transit hub along the trade corridor leading to Haifa Port.

Given the nature of this connectivity initiative, Saudi Arabia may be reluctant to fully commit, as doing so could allow its regional competitor, the UAE, to reap the project's economic benefits and strategic advantages. Unlike Saudi Arabia, which functions as a secondary transit node, the UAE's role within IMEC is far more central, particularly in terms of maritime logistics. While Jordan also plays an intermediary role similar to Saudi Arabia's, it does not exhibit the same competitive dynamic found in the Saudi-UAE relationship within the Gulf power struggle. As a result, Saudi Arabia's position remains a key variable in IMEC's future trajectory, introducing uncertainty regarding the extent of its long-term engagement with the initiative.

The Development Road Project

Meanwhile, the Development Road Project is one of the most tangible manifestations of Türkiye-Iraq economic cooperation. This corridor, estimated at approximately $20 billion, will originate from the nearly completed Al-Faw Port on the Persian Gulf, traversing Iraq via Basra, Najaf, Karbala, Baghdad, Tikrit, and Mosul before entering Türkiye through the Ovaköy border crossing. The initiative

(Murtadha Al-Sudani - Anadolu Agency)

can potentially be a transformative force in post-war Iraq's economic development, revitalising both the Iraqi and Turkish economies while contributing to broader regional trade integration. Gulf states, particularly Qatar and the UAE, have also expressed significant interest in the project, offering promising prospects for financing and enhanced regional connectivity.

However, the Development Road Initiative is not without risks. The corridor passes through regions affected by security threats from the PKK, YPG/PYD, and other militant groups. Nonetheless, shifting regional geopolitics—particularly the weakening position of the YPG/PYD in Syria—suggest a changing security environment. The Syrian government's demands for disarmament, combined with Türkiye's sustained cross-border counterterrorism operations, have contributed to broader efforts aimed at neutralising the security risks associated with the corridor. Equally significant is the deepening counterterrorism cooperation between Ankara and Baghdad. Unlike in previous years, the Iraqi government now acknowledges and supports Türkiye's legitimate security concerns. Baghdad also perceives the PKK's presence—particularly its symbiotic relationship with the Patriotic Union of Kurdistan (PUK) in Sulaymaniyah—as a direct challenge to its national security interests. This shift reflects a broader recognition that militant activity within Iraq's borders threatens not only Türkiye but also Iraq's own stability and economic development.

Given this growing alignment of interests, Türkiye and Iraq will likely take further steps to mitigate security risks along the Development Road corridor. While Iran has kept radio silence vis-à-vis the initiative, its position may shift under a potential second Trump administration's maximum pressure campaign. Rather than seeking to obstruct the project, Tehran could view it as an opportunity to secure economic advantages—an approach that would align with a more pragmatic strategic calculus. In recent years, Iran's political influence in Baghdad has faced increasing criticism from various political actors. Although Tehran exercises overwhelming control over Iraq's policymaking, a growing number of political factions now advocate for economic pragmatism over regional entanglements. Rather than allowing Iraq to be steered by Iran's geopolitical ambitions— which many argue have contributed to economic decline—these voices emphasise the need to prioritise national interests and economic growth. This shift reflects a broader push to reduce external dependency and foster stability through economic development.

Given these dynamics, the Development Road Initiative is crucial in reshaping regional economic and geopolitical alignments. If successfully implemented, it has the potential to enhance Türkiye's role as a key transit hub, accelerate Iraq's post-war reconstruction, integrate Gulf economies more deeply into regional trade networks, and offer a viable alternative to existing trade corridors constrained by geopolitical instability.

The Eastern Mediterranean: A Scramble for Energy and Maritime Connectivity

A second critical aspect of Middle East connectivity is maritime connectivity, an area of intense competition among regional actors, particularly in the gas-rich Eastern Mediterranean. Over the past two decades, the geopolitical landscape of the Eastern Mediterranean has been shaped by competing claims over maritime jurisdiction, with countries forming distinct alliances and signing agreements to delineate exclusive economic zones (EEZs) and continental shelf boundaries in alignment with their national interests. Especially in the early 2000s, natural gas exploration activities gained momentum in the Eastern Mediterranean, and regional actors put special emphasis on the area. Syria is emerging as a key factor in the post-Assad era in this evolving strategic environment, potentially serving as an important transit corridor for Gulf gas exports to Europe in the coming years.

Examining the competitive dimensions of this issue, two major areas of contention warrant particular attention. The first is the maritime delimitation agreement signed on November 27, 2019, between Türkiye and Libya's Government of National Unity. This agreement, which Türkiye officially registered with the United Nations, countered unilateral and maximalist Greek claims in the Eastern Mediterranean while securing Türkiye's maritime interests. Three years later, the two countries signed a second memorandum granting national oil companies the right to explore and extract hydrocarbons within the delimited maritime zones. These developments represented a strategic response to efforts to marginalise Türkiye's regional maritime rights.

In reaction to Türkiye's moves, the Eastern Mediterranean Gas Forum (EMGF), which was established in 2019, began to facilitate bringing together countries with overlapping interests in regional gas extraction and export. Initially formed as a platform for energy cooperation, the EMGF has evolved into a geopolitical bloc that reflects broader regional power dynamics. The forum includes Egypt, Greece, Greek Cyprus, Israel, Italy, Jordan, and Palestine, with the United States and the European Union holding observer status. Notably, Türkiye has been excluded, underscoring the forum's alignment with the maritime claims of Greece and the Greek Cypriot Administration.

Beyond energy coordination, the EMGF functions as a mechanism for balancing against Türkiye's assertive maritime policies in the Eastern Mediterranean. The forum's members have pursued various bilateral and multilateral agreements to reinforce their respective Exclusive Eco-

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nomic Zones (EEZs) while countering Türkiye's maritime delimitation arrangements, particularly those established through its agreements with Libya. This has heightened tensions in the region, as Türkiye views the forum as an effort to isolate its economic and strategic interests. Therefore, the EMGF has become more than just an energy consortium; it has become a geopolitical instrument reflecting the regional actors' national interests and ambitions.

Compared to the Türkiye-Libya axis, the Eastern Mediterranean Gas Forum (EMGF) has not established a legally valid agreement or memorandum under the auspices of the United Nations. Instead, it seeks to create a nominally multilateral framework that is essentially unilateral, exploiting legal loopholes within the international system.

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One of the forum's most ambitious connectivity projects, the EastMed pipeline, lost United States support under the Biden administration. This 1,900 km mega-connectivity initiative, intended to link Israel and Greek Cyprus to Greece, was initially projected to cost approximately €6 billion. However, there is currently no definitive timeline for its implementation. Furthermore, given uncertainties regarding its economic feasibility, stakeholders have instead discussed complementary connections, such as linking Greek Cyprus initially to Israel or Egypt rather than pursuing the full-length pipeline.

In contrast to the largely theoretical nature of EastMed, Türkiye has taken tangible steps through its exploratory activities conducted by the Yavuz and Fatih drilling vessels. The European Union, aiming to uphold its collective stance, has responded to Türkiye's actions against EMGF members, including Greece and Greek Cyprus, by imposing sanctions and citing violations of international law. However, the EU's approach lacks legal validity in the international legal order, further complicating the prospects for a comprehensive dialogue in the Eastern Mediterranean. In response, Türkiye has sought to ensure compliance with international law by formally registering its policies with the United Nations.

When assessing the Eastern Mediterranean and natural gas dynamics in light of diplomatic normalisation and emerging developments, four key issues warrant attention: (I) Türkiye-Egypt normalisation, (II) Syria's evolving role, (III) the ceasefire in Gaza and its implications for Middle Eastern security, and (IV) the war in Ukraine and EU's policy on Russia.

I. Türkiye-Egypt Normalisation

The first significant issue concerns Türkiye-Egypt normalisation and its implications for energy cooperation. While Egypt is a member of the EMGF, which can be viewed as an opposing bloc to the Türkiye-Libya axis, Cairo has largely pursued a balanced foreign policy over the past decade, seeking to avoid entanglement in Türkiye-Greece tensions. For instance, Egypt modified the maritime parcel outline in its 2020 delimitation agreement with Greece, opting for only partial delimitation. This was perceived as a goodwill gesture towards Ankara, particularly concerning the status of Rhodes and Kos.

Egypt's role in the Eastern Mediterranean's LNG geopolitics must also be assessed when it comes to domestic capabilities. In 2023, Egypt's LNG exports fell to 3.32 million tonnes from 7.14 million tonnes in 2022, and in 2024, it imported 2.78 million tonnes—the highest figure in seven years. This decline in output is primarily due to increasing domestic demand and the lack of new field discoveries. In response, Egypt may explore imports from Israel or, potentially, Greek Cyprus, although the latter option is unlikely before 2028. Given this scenario, Egypt could consider diversification strategies, leveraging the positive momentum from normalisation with Türkiye to explore new avenues of cooperation. Last year, Türkiye's Petroleum Pipeline Corporation (BOTAŞ) and the Egyptian Natural Gas Holding Company (EGAS) signed agreements covering technical infrastructure, information sharing, and trade in the energy sector. While Egypt is unlikely to disengage from the EMGF in the short term, its expanding cooperation with Türkiye—underscored by President Sisi's visit to Ankara last year—suggests continued collaboration in the energy domain.

Similarly, Türkiye remains committed to safeguarding its national interests regarding continental shelf delineation and delimitation in the Eastern Mediterranean. However, unlike past periods, Türkiye has moved beyond a purely diplomatic approach, actively pursuing concrete measures to reinforce its ambitions as an energy hub. In addition to diversifying supply chains, Türkiye has expanded collaboration with international firms, securing agreements with ExxonMobil and Shell in 2024 to enhance its energy security and portfolio diversification. These efforts have also strengthened Türkiye's technical and commercial expertise in LNG re-export and processing. Given these developments, Egypt may increasingly view Türkiye as a strategic partner capable of addressing its current energy dilemma, leading to broader cooperation in the sector.

(Turkish Presidency - Anadolu Agency)

II. Syria's Evolving Role in the New Period

The Syrian revolution culminated in the collapse of the Assad regime, ushering in a new era of state-building under Ahmed al-Sharaa's leadership. This transition has also revived discussions on the region's long-delayed connectivity and energy cooperation projects. As a result, Syria now represents a new variable in the Eastern Mediterranean energy equation. The historically strong ties between Türkiye and Syria could manifest in fresh opportunities for Türkiye to advance its potential to become a regional energy hub.

One of the most significant projects to reconsider in this context is the Türkiye-Qatar gas pipeline. Initially proposed in 2009 but abandoned due to the Syrian conflict, this project envisions a direct route connecting Qatar—one of the world's largest LNG exporters—to European markets via Syria and Türkiye. If realised, this initiative could foster broader regional interconnectedness with other Gulf states, creating a strategic energy transmission network. Given the EU's pivot towards non-Russian energy sources following the Ukraine war, European nations would serve as the primary market for this project. Additionally, compared to the EMGF-backed EastMed pipeline, which has yet to make tangible progress, the Türkiye-Qatar pipeline presents a more cost-effective alternative.

The lack of formal commitments from Qatar at this stage does not necessarily indicate outright opposition. Rather, Qatar's stance is one of caution, influenced by two primary factors. First, Syria remains in a transitional phase, with its state formation and international recognition still in flux. Stability and security assurances will be crucial for Qatar and other key stakeholders, including Saudi Arabia, before fully committing to such an initiative. Second, the prospect of a Türkiye-Syria delimitation agreement could provoke resistance from the EU, mirroring its opposition to past Türkiye-Libya memoranda. Such opposition could materialise through sanctions, discouraging stakeholders from advancing the project at this stage. Consequently, more concrete and predictable options may only become viable once Syria's transitional period stabilises.

Another highly improbable yet theoretically possible energy corridor involving Syria is the Arab Gas Pipeline project, originally spearheaded by Israel to transport natural gas from Egypt and Israel northward via Jordan and Syria. If realised, this pipeline could act as an alternative route for delivering gas from Israel and Egypt to Türkiye, and ultimately to Europe. However, there are big question marks about the viability of this option, as it depends on the stability of the region and subsequent normalisation between Türkiye and Israel, as well as between Syria and Israel. Additionally, this project could antagonise Greece and Greek Cyprus—both key EMGF members—given their shared framework with Israel. Currently, Jordan and Egypt indirectly facilitate Israeli gas flows to Türkiye through re-export mechanisms. Importantly, for the Arab Gas Pipeline to be operational, Syria's new administration would need to establish formal relations with Israel, a step that remains unlikely in the short term given Tel Aviv's bellicose approach.

(İzettin Kasım - Anadolu Agency)

III. Gaza Ceasefire and The Future of Regional Security

One of the most critical factors shaping the future of Middle Eastern connectivity discussions is the role of the Israeli-Palestinian conflict in regional security dynamics. Before October 7, the prevailing media narrative surrounding the India-Middle East-Europe Economic Corridor (IMEC) emphasised its visionary and transformative potential. However, Israel's military campaign in Gaza and the subsequent regional escalation significantly altered this discourse, leading to widespread speculation that the project had been effectively put on hold. The destabilising effects of these hostilities have been most evident in two key developments: the escalation of hostilities between Israel and Iran—primarily through Hezbollah as a major proxy actor operating in Iraq and Syria—and the maritime disruptions caused by Yemen's Houthi rebels, who have targeted Red Sea trade routes resulting in a significant hike in risk premiums.

The present situation is further complicated by the Trump administration's controversial peace proposal. The proposition, marketed as a pathway to lasting peace, advocates the forced displacement of Gaza's 2.3 million Palestinian residents to neighbouring Arab states such as Jordan and Egypt while placing the Gaza Strip under direct U.S. administration for an indeterminate period. This plan also envisions extensive reconstruction efforts and economic investment in the enclave, which former President Trump described as an opportunity to create the "Riviera of the Middle East." While the Netanyahu government and Israel's far-right coalition have expressed strong support for the proposal, it has been met with categorical rejection by the overwhelming majority of the international community, particularly among Arab states.

The fundamental flaws of this proposal lie in its oversimplification of the Israeli-Palestinian conflict's root causes, rendering it unviable from the outset. Nevertheless, both Washington and Tel Aviv appear intent on advancing this agenda, as reflected in Netanyahu's assertion that failure to implement the plan—particularly if hostages are released without it—would lead to the "gates of hell" being opened. Should this scenario unfold, the likelihood of renewed conflict is high, raising the question of whether Iran-backed proxy forces will become directly engaged in hostilities. Some analysts suggest that Iran may be reassessing the strategic value of its proxy network, shifting its focus towards its nuclear programme.

Regardless of these uncertainties, what remains clear is that implementing Trump's proposal would result in reduced integration and increased fragmentation across the region. Firstly, the viability of connectivity initiatives would be severely compromised in the event of renewed conflict, undermining the security environment necessary for such projects. Secondly, the diplomatic engagement required to advance these initiatives would likely be disrupted, potentially pushing Gulf states away from U.S.-led frameworks towards China-led alternatives. The erosion of diplomatic channels could also lead to the indefinite suspension of major infrastructure projects such as IMEC and the EastMed pipeline under the Eastern Mediterranean Gas Forum (EMGF) framework.

In sum, the future of Middle Eastern connectivity is closely intertwined with the trajectory of the Israeli-Palestinian conflict. Should the United States and Israel persist in advancing this proposal, the region will likely face heightened uncertainty and risk, with profound implications for connectivity initiatives and broader geopolitical alignments.

IV. The War in Ukraine and the EU's Policy on Russian Gas

If a Trump-led ceasefire deal in Ukraine materialises, its impact on the EU's strategic decoupling from Russia—particularly in energy—would depend on the nature of the ensuing agreement and Europe's political response. While the EU has significantly reduced its reliance on Russian natural gas since the start of the war, a shift in U.S. policy under Trump could introduce new dynamics. Three key scenarios outline how different ceasefire arrangements might shape Europe's energy landscape and broader economic ties with Russia.

In the first scenario, a ceasefire that reinforces the status quo without resolving core territorial disputes would do little to reverse the EU's decoupling from Russia. If fighting halts while territorial disputes persist, European policymakers would remain sceptical of Moscow's intentions and continue efforts to insulate the continent from Russian leverage. The energy sector, in particular, would see minimal changes. Since 2022, the EU has diversified its natural gas imports by increasing LNG purchases from the U.S., Qatar, and Algeria while ramping up pipeline imports from Norway. Given the substantial investments in alternative supply chains and infrastructure, a frozen conflict scenario would not lead to the reinstatement of Russian pipeline gas at pre-war levels. Broader economic decoupling would remain largely intact, as security concerns and U.S. political pressure would deter major reintegration efforts.

A more drastic scenario would emerge if a Trump-led ceasefire fosters a broader Western-Russian rapprochement. Should Trump pressure Ukraine to make territorial concessions, the EU would face internal divisions in reinvigorating its economic ties with Moscow. While many European governments, particularly those in Eastern Europe, would resist reopening economic channels with Russia, certain actors—such as Hungary and elements of Germany's industrial sector—could push for reintroducing limited

Russian gas imports. Trump's potential rollback of U.S. LNG exports to Europe might further incentivise these discussions. However, a return to pre-war energy dependence remains unlikely. The EU has already taken legislative and financial steps to wean itself off Russian energy, and any attempts at rapprochement would face strong resistance from countries that view Russian influence as a direct security threat. Even if certain trade restrictions could loosen under this scenario, strategic decoupling would remain in place, especially in critical sectors such as defence, technology, and finance.

The most complex scenario involves a ceasefire that weakens Western unity on sanctions enforcement. If Trump were to undermine transatlantic consensus on restricting Russian economic activity, some EU members might seize the opportunity to restore select trade relations with Moscow. In the energy sector, this would likely manifest in the increased importation of Russian LNG, which some European countries have continued purchasing at reduced levels despite ongoing sanctions. Relaxing restrictions could lead to a rise in Russian LNG shipments to Europe, but a large-scale return to pipeline gas dependence still remains improbable. More broadly, while some European industries might advocate for renewed engagement with Russia to alleviate high energy costs, security concerns—especially among Baltic and Eastern European states—would likely prevent any full-scale reintegration. Restrictions would remain firmly in place in sectors deemed critical to long-term strategic resilience, such as raw materials and defence technology.

In analysing the potential outcomes of the three scenarios, it is crucial to emphasise that the EU's pursuit of strategic autonomy remains the central variable. This endeavour, which involves reducing reliance on external powers—especially Russia—while ensuring energy security and geopolitical resilience, will guide EU decision-making. Regardless of the terms of a potential Trump-led ceasefire, the EU is unlikely to applaud any agreement that excludes Ukraine, especially given the political and security ramifications for member states. Such a scenario would likely result in significant divisions within the EU as the bloc navigates differing national interests and regional security concerns.

In this context, the East Mediterranean presents a key opportunity for the EU to further its energy diversification goals. The prospect of East Mediterranean gas serving as an alternative to Russian supplies has gained increasing importance. The EU will likely prioritise the most viable options for enhancing maritime connectivity, including updating connections to Middle Eastern supplies or considering the Türkiye-Qatar pipeline as a strategic alternative. These initiatives would be essential in ensuring stable and diversified energy sources for Europe, particularly if the EU continues implementing its decoupling strategy from Russian energy.

However, the complex geopolitical dynamics of the region must also be considered. The Turkish-Greek dispute over maritime boundaries and energy exploration in the Eastern Mediterranean remains a critical challenge. If the EU adopts a policy of strategic decoupling from Russia, the bloc could revisit its choices regarding Turkish-led energy projects. Should the EU prioritise reducing Russian influence and securing alternative energy routes, it may be compelled to encourage energy supply routes involving Türkiye. This shift could be particularly relevant in light of the growing importance of energy security and the potential leadership role Türkiye could play in facilitating energy flows from the East Mediterranean to Europe. Pragmatism is essential for the EU to balance political divergences with Türkiye while advancing broader strategic goals in energy and security.

Another alternative for the EU's strategic decoupling agenda is the American alternative. Trump, with a transactional approach to foreign policy, is well-known for his distaste for the EU buying Russian gas during his first term, and he accused the European leaders of financing Russia while also being in full comfort with NATO's security umbrella. If Trump pushes for increased U.S. gas exports to Europe as a strategic alternative to Russian energy, it could significantly accelerate the EU's decoupling from Russia. U.S. liquefied natural gas (LNG) could become a critical component of Europe's energy diversification strategy, especially as the EU seeks to reduce its reliance on Russian energy sources. This move would likely involve expanding U.S. LNG infrastructure, such as terminals and export facilities, to ensure steady and reliable deliveries. The push for American gas could also reshape EU energy markets, potentially reducing the bloc's vulnerability to Russian supply disruptions. However, this shift would not be without challenges, including the cost and logistical hurdles associated with large-scale LNG imports. Moreover, such a policy could create tensions within the EU, particularly among member states that have invested heavily in pipeline infrastructure with other suppliers, such as in the East Mediterranean, or those that remain sceptical of U.S. energy dominance in Europe.

In conclusion, the EU's strategic autonomy, especially for energy diversification, will be a decisive factor in shaping the future of its energy relationships. The East Mediterranean holds significant potential as an alternative to Russian energy, but the EU must avoid further politicising the issue regarding Türkiye's maritime claims to fully capitalise on this opportunity. The U.S. as an alternative LNG importer would be another option for the EU's strategic decoupling agenda if Trump keeps his transactional approach to dominate the continent's energy imports. The policy decisions made in response to a potential ceasefire in Ukraine will, therefore, bring long-term implications for EU energy security and its broader geopolitical positioning.

Conclusion

The evolving geopolitical landscape is reshaping connectivity in the Middle East, both in terms of land and maritime routes. The post-Assad era introduces a new Syria, poised to emerge as a promising route in regional trade corridors. Meanwhile, the Trump administration's policies—particularly regarding the Gaza ceasefire and stance on Iran—are likely to play a decisive role in shaping regional dynamics.

Amidst growing uncertainties and risks, Türkiye is adopting a proactive stance through strategic initiatives like the Development Road and the consolidation of its positions in the Eastern Mediterranean. Enhanced relations with Syria and advancing normalisation with Egypt further bolster this approach.

Conversely, projects that exclude Türkiye—such as the EastMed pipeline or IMEC—will likely remain projects on paper, given their questionable feasibility and security challenges. As the global balance of power shifts towards a more multipolar order, trade corridors will assume an increasingly pivotal role. In this context, competition and cooperation will continue to coexist in shaping the future of Middle Eastern connectivity, and the criticality of Türkiye's position will only become more evident.

(Serkan Avcı - Anadolu Agency)