

Securing or Insecuring Israel? Assessing the Israel-Lebanon Maritime Agreement

by [David Schenker \(/experts/david-schenker\)](/experts/david-schenker)

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ABOUT THE AUTHORS



[David Schenker \(/experts/david-schenker\)](/experts/david-schenker)

David Schenker is the Taube Senior Fellow at The Washington Institute and director of the Program on Arab Politics. He is the former Assistant Secretary of State for Near Eastern Affairs.



Articles & Testimony

Taking stock of last year’s deal shows that while there were plenty of good reasons for Washington and Jerusalem to accept it, improving Israel’s long-term security was not one of them.

For the Biden Administration, the demarcation of the Israeli-Lebanon maritime border was a crowning diplomatic achievement. In brokering a deal to delineate the exclusive economic zone (EEZ) between these warring states, Senior Advisor for Energy Security Amos Hochstein succeeded where successive US Administrations had failed. Though largely well-received, the agreement is not without flaws and controversy.

When he rolled out the deal, Hochstein described it as a “win-win” for Lebanon and Israel. For Lebanon, a state mired in a devastating economic crisis, the agreement provides the eventual prospect of significant revenues. Meanwhile, Israel, according to Hochstein, “gets stability” and “total security.” Then Israeli premier Yair Lapid and the Israeli Defense Forces agreed with Hochstein’s assessment.

To be sure, the IDF’s record as the arbiter of Israeli security is solid. Still, it is not evident that the agreement, in the words (<https://www.haaretz.com/israel-news/2022-10-02/ty-article/lapid-lebanon-maritime-deal-preserves-israels-security-and-economic-interests/00000183-97f5-d28c-a58f-9ffd77d00000>) of Lapid, “strengthens Israel’s security.” Indeed, the context and timing as well as the actual terms of the deal suggest that the maritime agreement may at best only lead to a temporary de-escalation of tensions between Israel and the Iranian-backed Lebanese Shiite militia Hezbollah along the land and sea borders, delaying—but not ultimately preventing—a future conflagration.

The agreement was reached during a moment of heightened tensions between Israel and Hezbollah. In recent years,

along the frontier, Hezbollah has expanded its already extensive alleged environmental NGO “Green without Borders” military bases, and **stepped up its assaults (<https://www.washingtoninstitute.org/policy-analysis/unifil-follies-turn-deadly-israel-lebanon-border>)** on United Nations peacekeepers patrolling the area. During this timeframe, the militia likewise **expanded its air defense capabilities (<https://www.washingtoninstitute.org/policy-analysis/dont-look-down-struggle-over-lebanons-airspace>)** vis-a-vis the Israeli Air Force. Hezbollah also became more conspicuous in the deployment of its Radwan special-forces units to the border region.

At the same time, in the months leading up to the October 2022 maritime agreement, Hezbollah threatened to attack the Energean floating production system rig in Israel’s offshore Karish natural gas field—located in undisputed Israeli EEZ waters—if Israel started pumping before a deal was reached. Then in July, the IDF downed three drones dispatched by Hezbollah to surveil the Energean. Israel had previously announced that it would start pumping in September, regardless of the status of negotiations. However, under threat of attack, Israel delayed extraction for nearly two months.

Pressures along the border and the threat of war at sea appear to have added a sense of urgency for Israel at the negotiating table. That is certainly the message that Hezbollah officials have been promoting. As one militia spokesman told *The Washington Post* (**<https://www.washingtonpost.com/world/2022/10/27/lebanon-israel-hezbollah-maritime-deal/>**) in late October, the drones “hastened along the negotiations...if it were not for Nasrallah’s gun that was placed on the head of the Israeli government, [the deal] wouldn’t have happened.”

Hezbollah’s comments are no doubt partly spin. The organization is not proud that it signed off on the agreement—a necessity given the economic deterioration in Lebanon. Blessing the deal has resulted in some real reputational damage. Still, Hezbollah can credibly assert that the threat of escalation not only delayed Israeli gas extraction; it also resulted in an agreement in which the terms were highly favorable to Lebanon. This message, if actually internalized by Hezbollah, could embolden the organization.

In the agreement, Israel acceded to Lebanon’s opening negotiating position, foregoing the totality of its own EEZ claims and gifting Lebanon with 330 square miles of disputed area. In exchange, the longstanding de facto maritime border for the first three miles adjacent to the shoreline will remain in place, a development that then Minister of Defense Benny Gantz **said (<https://www.jpost.com/breaking-news/article-719493>)** would guarantee Israel’s freedom of action off the coast. While not dismissing the importance of this freedom of action, historically, the challenge posed by Hezbollah to Israel has played out primarily along the land border known as the Blue Line. It is difficult, in any event, to understand how formalizing these three miles of the current maritime boundary makes Israel demonstrably safer.

One argument being made in Jerusalem and Washington to advance this claim is that the agreement creates a mutuality of interests between Israel and Lebanon. A stipulation of the deal is that in exchange for allowing Lebanon to extract gas from Qana field, which extends south of Lebanon’s EEZ, Israel will get a share of the profits from the French energy multinational Total, which has been contracted to exploit the field. This arrangement, it has been argued, essentially makes not only Lebanon, but Hezbollah as well, business partners with Israel, stabilizing the environment for investment and economic activities in the Eastern Mediterranean. In October, Hochstein echoed this optimistic view on Israel Channel 12, **saying (<https://www.timesofisrael.com/downplaying-concessions-us-envoy-tells-israelis-deal-with-lebanon-keeps-them-safer/>)**, “Knowing that from the Karish [gas] field all the way down south there will not be the threat of missiles” provides Israel with security.

While this argument has some merit, it is important to remember that, as Director General of the Israeli Foreign Ministry Alon Ushpiz **observed (<https://main.knesset.gov.il/EN/News/PressReleases/Pages/press201022q.aspx>)**, “the agreement is not binding for Hezbollah.” In a future conflict between Israel and Hezbollah, Israeli energy assets

in the Mediterranean—whether in Karish, Leviathan, or Tamar—are unlikely to be immune from Hezbollah attack. Indeed, Hezbollah would have little compunction in striking the British-owned Energean rig. In any event, the mutually assured destruction model of deterrence—the threat that Israel would retaliate by targeting assets in the Lebanese EEZ—does not apply. Israel would be loath to target platforms owned by the French oil company.

Making matters worse, Hezbollah might even benefit economically from the agreement. Indeed, absent effective and transparent accounting procedures, any financial windfall from offshore gas is likely to vanish in the abyss of Lebanon’s prodigious corruption. As a key node in this corruption network, Hezbollah is sure to profit.

Even more concerning to Israel than threats in the Mediterranean should be Hezbollah’s long-term initiative to upgrade tens of thousands of its rockets and missiles, known as the Precision Guided Munitions or PGM project. Half a decade ago, the IDF identified progress on this project as a “red line” and routinely **characterized** (<https://www.israelhayom.com/2021/02/25/israels-red-line-1000-precision-missiles-in-hezbollahs-hands/>) it as “the greatest threat to Israel today,” second only to the Iranian nuclear program. Israeli efforts to stymie the program have not been successful, and Hezbollah continues to make steady progress upgrading its arsenal. The militia’s commitment to the PGM project remains, notwithstanding the maritime agreement.

It is unclear how the deal will impact future Israeli efforts to disrupt the PGM program. These efforts will no doubt continue but could conceivably be constrained due to concerns of escalation that could impact Israeli energy assets.

Putting aside this skepticism about the alleged long-term security benefits, the agreement does have some positive aspects. Even if the deal was not actually signed by both Israel and Lebanon—but rather each party separately with the United States—it removes one point of contention between the states. Along these lines, it demonstrates the potential to solve thorny issues between Israel and Lebanon diplomatically. The signed document mentions the word “Israel,” an unusual if not unprecedented development for Lebanon. Moreover, Hezbollah’s acquiescence to an agreement that implicitly recognizes Israel discredits the organization. Perhaps most importantly, the deal also, at least temporarily, averts an imminent Israel-Hezbollah military confrontation. And so on.

These aforementioned derivative benefits of the deal for Israel are real and consequential. Still, the agreement is no panacea. Lebanon is unlikely to realize significant economic dividends for the better part of a decade—and therefore the agreement will do little to stabilize the state and the Eastern Med any time soon. Meanwhile, Hezbollah may emerge from the maritime negotiations overconfident, which could raise the risk of escalation, under other pretexts, in the future. In sum, there were plenty of good reasons for Washington to broker and for Israel to consent to this deal. Improving Israel’s long-term security, however, is not necessarily one of them.

David Schenker is the Taube Senior Fellow at The Washington Institute and director of its Program on Arab Politics.

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