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Cooperation between Turkey and Libya on Maritime Transport *Libya ile Türkiye Arasında Deniz Ulaştırması Alanında İşbirliği*

Ergün DEMİREL^a

^aDepartment of Maritime Transportation and Management Engineering, Piri Reis University,
Maritime Faculty, Istanbul, Turkey

^aPiri Reis Üniversitesi, Denizcilik Fakültesi, Deniz Ulaştırma İşletme Mühendisliği Bölümü, İstanbul, Türkiye

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ABSTRACT

Turkey is an important agent in MENA region, especially in the Eastern Mediterranean. Although it does not have oil sources, Turkey is one of the developing countries of the region. It has historical and cultural ties with all countries in the region. Libya, on the other hand, is a country with significant oil reserves in the world and is dependent on foreign countries with its limited industry and agriculture. Since the year 2011 civil unrest and war continue in this country. While France, Egypt, Greece, Italy, GCA (Greek Cypriot Administration), United Arab Emirates support the Libyan National Army, Turkey and Qatar support to the Nation Reconciliation Government (GNA) at the West recognized by the United Nations. This situation is temporary and will change soon. It is inevitable to achieve order by reaching a consensus in Libya soon.

The aim of this research is to evaluate possible development and economic activities in Libya, in the near future and defining the scope of maritime transport will be realized for this purpose. Finally, assessing the sustainable cooperation areas in the *maritime transportation* between Libya and Turkey.

This research starts analysing the political, economic, social, and military relations of the two countries and as a result, identifying possible areas for a sustainable cooperation in the maritime transportation. Afterwards, the determined areas of cooperation will be examined separately, and the results and proposals will be presented.

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ÖZ

Türkiye MENA Bölgesinde özellikle de Doğu Akdeniz’de önemli bir aktördür. Petrol yataklarına sahip olmamasına rağmen, bölgenin gelişmiş ülkelerinden birisidir. Bölge ülkeleri ile tarihsel ve kültürel bağları bulunmaktadır. Libya ise Dünyanın önemli petrol yataklarına sahip bir ülkedir; kısıtlı sanayisi ve tarımı ile dışa bağımlıdır. 2011 yılından bu yana, iç huzursuzluk ve savaş ortamı süren bu ülkede, Fransa, Mısır, Yunanistan, İtalya, (Kıbrıs Rum Yönetimi), Birleşik Arap Emirlikleri ülkenin Doğusundaki Libya Ulusal Ordusuna, Türkiye ve Katar ise Birleşmiş Milletler

*Corresponding author / Sorumlu yazar

*E-mail: edemirel@pirireis.edu.tr



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tarafından tanınan Batıdaki Ulusal Mutabakat Hükümetine destek sağlamaktadır. Bu durumun sonsuza kadar devam etmesi beklenemez. Yakın bir gelecekte Libya'da bir mutabakat sağlanarak sürdürülebilir bir düzenin sağlanması gerekmektedir.

Bu araştırmanın amacı, Libya'daki muhtemel gelişmeleri ve yapılacak ekonomik faaliyetleri ve bu amaçla yapılacak deniz ulaştırmasının kapsamını değerlendirerek; Türkiye ile Libya arasındaki denizcilik konusunda sürdürülebilir işbirliği imkânlarını ortaya koymaktır.

Bu araştırma iki ülkenin politik, ekonomik, sosyal, askeri ilişkilerinin değerlendirilmesi ve bunun sonucu olarak denizcilik alanında sürdürülebilir işbirliği sahalarının belirlenmesi ile başlayacaktır. Bilahare belirlenen işbirliği sahaları ayrı ayrı irdelenerek bu alanda sonuç ve öneriler sunulacaktır.

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1. INTRODUCTION

As result of the Civil War and Foreign Intervention in Libya in 2011, damage and disorder from the war has been considerable. There are frequent electric outages, little business activity, and a loss in revenues from oil by 90%. A third of the country's population has fled to Tunisia as refugees. Main source of the country, oil production has fallen from 1.6 million barrel per day to 900,000 in five years of war and civil disturbance. Despite periodic economic and political crisis, a considerable emerge of economic activity is expected reconstruction of urban areas and infrastructure is expected soon (Abmdas & Demirel, 2018).

The most important economic aspect for Libya is inclusion in the international economy. To achieve that Libya should establish a continuous shipping and open its ports for operation in a short period. Shipping is one of the most important forms of transportation for global trade. The ports play an important and vital role in the maritime transport chain because it represents the link between road transport and maritime transport, in addition cannot be global trade that have an affair in the absence of ports).

The development of global supply chains requires high inland accessibility and efficient port operations. There is a tendency towards logistics integration in the shipping and port industry. The integration between ports and logistics-related activities contributes to the development of the concept of a "port-hinterland relationship" (Notteboom and Rodrigue 2005).

Container and Ro-Ro terminals are nodes that link with other inland transport modes such as highways, railways, and inland waterway systems. The role of container terminals is now evolving from a cargo handling point to a distribution centre enhanced and became logistic bases. Hence, container and Ro-Ro terminals have a significant role to provide interface between the areas of production and consumption.

1.1. Political Situation in Libya

Libya is a country with a long sea lane and a large part of its land is a desert without suitable living conditions (Fig. 1). The country is surrounded by Chad, Niger, Algeria, Tu-

nisia, and Egypt. Libyan borders with other countries are in the desert, and the control of border crossings is almost impossible.

After the overthrow of Gaddafi government in 2011, United Nations recognized the National Transitional Council (NTC) [now called as Government of National Accord-NGA] at Tripoli as legal representative in Libya. Most of the population refused the legality of NTC government and The House of Representatives (HoR), elected in 2014 relocated to Tobruk. Second Libyan Civil War started at 2014. General Haftar led HoR take over the control of two-thirds of Libya in a short period as NTC controls only a small part of country including Tobruk and Tripoli. Two governments in Libya; Tobruk based HoR. and LNA (Libyan National Army) supported by Libyan House of Representatives are now controlling Eastern and Central Libya. HoR does not have a regular army but some militia groups supported by only Turkey and Qatar. Political Situation in Libya is shown in the Figure 1 extracted from Africa Center for Strategic Studies (2020).

Libya is an important country having oil reserves and all respective parties are looking for stabilization in Libya without military operation unless needed. Libya's eastern-based military leader Khalifa Haftar said his Libyan National Army (LNA) was accepting a "popular mandate" to rule the country, apparently brushing aside civilian au-

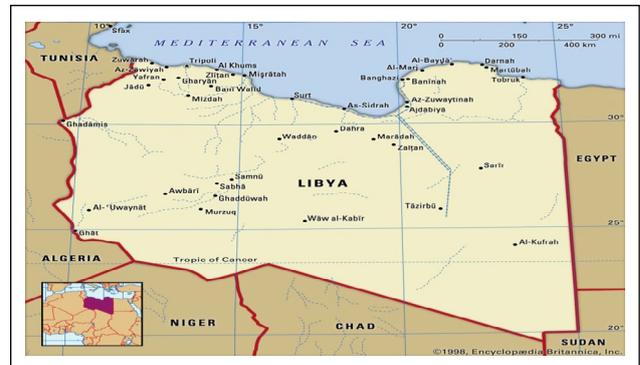


Figure 1. Libya and Neighbourhoods (Source: Encyclopaedia Britannica, 1998).

thorities nominally governing eastern Libya (Defense web, 2020). Two third of the country is under the control of LNA and military power is rather strong comparing with GNA. The LNA have overt support of Western countries in the diplomatic arena (Fig. 2).

1.2. Powers/Actors Politics on Libya

Since Gaddafi took power, oil has been the main resource in the hands of the leader of the newly proclaimed Libyan Arab Republic. The triumph of the 1969 revolution marked a paradigm shift, moving the new government to use its oil income to boost redistributive measures among the population, generating a new model of economic and social development for the country. According to analysts, among the measures of “economic sovereignty” which drove Gaddafi’s policies were the nationalization of various Western oil companies. Throughout Gaddafi’s tenure, ambitious social programs were launched in the areas of education, health, housing, public works and subsidies for electricity and basic foodstuffs. These policies led to a substantial improvement in the living conditions of Libyans, from being one of the poorest countries in Africa in 1969 to being the continent’s leader in its Human Development Index in 2011 (Telesur, 2015).

United Nations Development Programme (2010) considered Libya a high-development country in the Middle East and North Africa. This translated status meant a literacy rate of 88.4 percent, a life expectancy of 74.5 years, gender equality, among several other positive indicators.

France is effectively using the Libyan conflict to keep making a profit, even if this means that its weapons are used to further the violence Although France denies taking sides in the conflict (Open Democracy-2020). Although France denies taking sides in the conflict, French President Emmanuel Macron was the first Western leader to invite General Haftar to Europe for peace talks, and France launched air strikes in support of his forces in February 2019. They targeted Chadian opposition forces fighting against the LNA in the south (BBC, 2020). Khadafy has been a strong

threat for France controlled Central Africa after Libya has started an offensive in Chad. France is happy with a Libya without Khadafy and a weaken Libya which cannot involve their area of interest. It is French policy to get involved in all conflict areas in the world and looking for probably military sales to Libya as it was in 1980s. Haftar’s army has received financial and military support from Egypt, Saudi Arabia, and the United Arab Emirates (UAE). However, another nation that has also been propping up Haftar’s forces is France. Being a member of the UN Security Council, this support is somewhat controversial as France’s official position is in support of the UN-backed GNA, rather than the opposing side. But Macron’s administration sells weapons to Egypt, Saudi Arabia, and the UAE, and likely does not want to lose them as customers.

NATO quickly retreated leaving Libyans to piece their country back together (Open Democracy-2020). Though the United States helped lead the North Atlantic Treaty Organization (NATO) coalition that brought down Qaddafi in 2011, it no longer has a presence in Libya and has played a limited role in the current conflict. The United States officially supports the GNA but has not provided it with military support in its battle against the LNA. The primary U.S. concerns in the region are counterterrorism-related, and the United States has conducted joint air strikes with the GNA against Libya’s Islamist groups (Council on Foreign Relations, 2021). US is the main actor in Libya. relations between US and pro-Haftar is not a secret and now anti-US Gaddafi era is over. Only problem is Libya to defeat the Islamist groups and riot tribes in the South. Many. US politicians believe that America led power projection to Libya was a mistake and it should not be repeated. So, US prefer not a direct involvement at that stage but providing support to Haftar to establish stabilization, having the support of allied countries.

Due to Russia’s preference for a finite LNA offensive and uncertainties about Haftar’s leadership capabilities, Moscow has maintained a diplomatic backchannel with the GNA. As Haftar’s offensive continued, Russia maintained positive relations with the LNA through PMC deployments, which are reportedly financed by Saudi Arabia, and stepped up its arbitration role in Libya (RUSI, 2021). It is then evident that Russia, which has increased its presence in Libya especially in recent years, aims not so much to realize its economic and security interests there as to become a player with a voting right in a geopolitical competition that runs both between global and regional forces in the Mediterranean region (INSAMER; 2020). Russia’s political aim is to stop US direct intervention to Libya and become a key player. Russia declared that Russia would provide support to LNA if the intervention will be conducted under UN umbrella but not NATO.

Italian foreign policy always interested in dynamics of cooperation and conflict in key geographical regions such



Figure 2. Political Situation in Libya as of June 2020 (Source: Africa Center for Strategic Studies, 2020).

as the Mediterranean and Middle East, Asia, Eurasia, Africa and the Americas (Altunışık, 2020). The country's interests in the fate of Libya are huge and compare to no other European country, from dependence on Libyan hydrocarbons, to migration, to terrorism. How successful Italy has been at protecting these interests, or safeguarding Libya's political transition, is less certain (ECFR, 2020). Before 2011 Italians got important projects in Libya and they want to continue them as well as they assume that Libya is the nearest and most feasible oil source for them. Although Italians are in a position to follow EU policy for Libya, they do not want a direct involvement which may create a negative impact for future relations with Libya. Before 2011.

Federal Germany focuses on preventing refugees from reaching Europe, and Libya gains importance for Germany within the framework of this policy. Berlin's interest in Libya is that this country, which is very rich in oil and natural gas resources and geographically close to Europe, is one of the important alternatives in Germany's energy supply (SETA; 2020). Standing out as the leader of the EU in times of crisis, Germany should also play a leadership role in solving the Libyan crisis, which has become a conflict area for EU countries such as France, Italy, and Greece. Otherwise, the deepening of this crisis may cause greater damage to the EU integration, which is already experiencing serious problems.

In terms of Libya, the military and intelligence assistance that Turkey provided to the GNA led to a reversal of the military balance and a rethinking of the political calculations of all actors involved in the Libyan crisis. Egypt's decision-makers realized that there is a need for a new approach to deal with the Libyan conflict in order to prevent Turkey from expanding its influence over the GNA (Arab World, 2021). Sisi wants to stop Muslim Brothers settlement in stern Libya which is the biggest threat for his government. Egypt is the strongest supporter of Haftar.

Britain's Secretary of State for the Middle East, James Cleverly, stated that her country stands by the legitimate Government of National Consensus (GNA) recognized by the United Nations (UN) in Libya (Egypt Independent, 2021).

Turkey and Qatar support GNA at the West. Turkey claims that GNA is the legal government recognized by UN as it fights against UN recognized Assad's government in Syria. Turkey also accused by many countries providing military support to Muslim Brother which is the enemy for Egypt as well as Jihadist Islam organization in the West (Arab World, 2021).

Turkey's military assistance to the Government of National Accord (GNA) has enabled the Tripoli-based government to turn the tide of the civil war and capture territory held by the Libyan National Army (LNA) forces command-

ed by Khalifa Haftar, who has received covert support from France in addition to substantial support from Egypt and the United Arab Emirates (UAE). Following the Courbet incident¹, France's foreign minister Jean-Yves Le Drian condemned Turkey's "growing military support" claiming it to be "in direct violation of the United Nations embargo.

Since April 2019, the United Nations-recognized and Tripoli-based Government of National Accord (GNA), supported by armed groups in western Libya nominally under its control, has been embroiled in an armed conflict with the rival Interim Government based in eastern Libya, which is affiliated with the armed group Libyan Arab Armed Forces (LAAF) [LNA] under the command of General Khalifa Haftar (Human Right Watch, 2021). On October 23, conflict parties signed a country-wide ceasefire agreement in Geneva.

Migrants, asylum seekers, and refugees in Libya—including thousands intercepted at sea while trying to reach Europe and returned by the European Union-supported Libyan Coast Guard—faced arbitrary detention, during which many experienced ill-treatment, sexual assault, forced labour, and extortion by groups under the GNA Interior Ministry, members of armed groups, smugglers, and traffickers.

For the last decade, external sponsors and non-state actors have pursued conflicting interests in Libya, turning the initial civil war into a protracted conflict with no end in sight. However, recent events suggest that the country is once again on Washington's radar. Given the wide-ranging regional security risks posed by the situation, the Biden administration is likely to become involved in some capacity (Fasanotti, 2021).

The UN Security Council has authorized international monitors to watch over a nearly six-month-old cease-fire agreement in Libya as the country heads toward December elections after a decade of fighting and upheaval (Egypt Independent, 2021).

If we make estimation for the future of Libya, there is a huge coalition supporting Haftar who also had a regular army commanded by ex-Libyan officers. The GNA supported by only Turkey and Qatar cannot stand against Haftar's forces for a long duration.

1.3. Turkish Energy Policy and Libya

Turkish Ministry of Energy and Natural Sources (ETKB, 2017) explains that Turkish energy policy has three distinct components. These components are procurement diversification, securing sufficient reserve; instrument to elevate its geopolitical importance, and to a lesser extent, means. Yilmaz (2018) explains Turkish energy policy as follows: (1) enabling the country to diversify its suppliers and thus secure its energy reserves at home; (2) using as a 'transit country'

¹ The French frigate Courbet patrols the eastern Mediterranean as part of Operation Sea Guardian under NATO mandate. On June 9, the day before the incident, the French frigate was ordered to inspect a Turkish freighter, the Cerkin, suspected of arms smuggling.

position as leverage against its rivals, enabling it to maximize national interests and being a emerging regional power.

Turkey is a petroleum and natural gas poor country. So, energy policies. Has always been priority for Turkish economy and foreign policy. Turkey has established a vision (Political Vision 2023) which aims to be a global player a powerful mediator for peace and stability in the Middle East ; which portrays Turkey as a rising global player, a powerful mediator. Energy policy is an essential element which shapes the foreign policy. AK Parti (2012) states that the Turkish government openly associates the country's political and economic stability with its regional energy-related interests and intends to be in a constant dialogue with all of its neighbours in this regard.

Turkish government strives to integrate the country into the energy and transportation networks already established in the Middle East by presenting itself as a trade hub for the resources flowing through the Caspian Sea, the Black Sea, and the Mediterranean (MFA 2013). To secure energy demand of the country Turkey is trying to reduce 70 percent energy import dependency, diversifying energy sources (ETKB, 2017).

There were many projects handled by Turkish contractor and Libya was the most suitable oil producing country before 2011. Nowadays Turkey tries to get some contractor works from GNA government. But, if LNA takes over the overall control of Libya, Turkey may have many problems to establish economic and political links with Libya due to its pro-GNA policy.

1.4. Libyan Economy

The petroleum and natural resources are the main element of Libyan economy. According to World Bank (2020a) oil production decrease around 0.4 million barrels per day (bpd) or the fourth of potential”.

Budget deficiency is still a problem. Deficit was 7.3 percent of GDP in 2020 and 1.4 percent expected in 2022 as economic growth still goes down. Libyan economy continued to suffer from the disordered political conflict and subsequently worsening financial situation and GDP is halved comparing with 2011 (World Bank, 2020a). In this situation, it is unlikely to make investment for reconstruction of damaged infrastructure in Libya.

Libya is the nearest petroleum exporter for Europe. It is strongly believed that all parties which have interest in Libya will take action to establish order an facilitate economic activities in this country. Abmdas and Demirel (2018) states that “Despite periodic economic and political crisis, a considerable emerge of economic activity is expected in the near future in particular reconstruction of urban areas and infrastructure is expected soon”.

1.5. Economic Situation of Turkey

At the beginning of 2000s, the Turkish economy had a good performance and GDP grew, unemployment rate

is reduced. After 2008 foreign debts have increased and mistakes in foreign policy started to effect economic relations. Turkey still has not recovered after the 2008 crisis. The spending of the budget on unnecessarily expensive projects and tender frauds made the economy difficult to manage. There is a serious problem in the repayment of approximately \$ 600 billion foreign debt. While TL constantly depreciated, interests increased, and investments almost stopped. There is no foreign exchange reserve in the Central Bank, and it has even decreased to minus \$ 120 billion. World Bank (2020b) assessment for Turkey is as follows; in the past few years, growing economic vulnerabilities and a more challenging external environment have threatened to undermine those achievements”.

Turkey's status declined from Partly Free to Not Free due to a deeply flawed constitutional referendum that centralized power in the presidency (Freedom House, 2019). Termination of political and economic reforms, political conflicts among US, EU, and Russia, uprising of autocratic governance after 2016 Turkey's slip out of both democratic and legal norms, continuously increasing budget deficiency cast a shadow on Turkey's reliability. Consequently, this situation seriously affected the foreign investments. Turkish involvement in conflicts in the Middle East has also created a negative impact on relations between Turkey and its allies. The COVID-19 pandemic also negatively affected production, export, and import.

The overall macroeconomic indicators are more vulnerable and uncertain, given rising inflation and unemployment, contracting investment, elevated corporate and financial sector vulnerabilities, and patchy implementation of corrective policy actions and reforms (World Bank, 2020b). Unfortunately, there is no attempt to recover economic collapse unless new economic policies are adopted.

2. RESEARCH AND RESULTS

Currently, Turkey and Libya are faced with serious economic problems and needs. Libya's priority is now rapid reconstruction its damaged infrastructure. Turkey is looking for increase of exports to gain foreign currency which is vital for its production. Cooperation between these two countries could be a good solution.

Turkey has one of the largest construction industries in the world. The country has 44 contracting companies building the largest volume of projects across the world outside their home country “Top 250 international contractors list, 2019” (ENR, 2020), Turkish construction companies would benefit from some more positive global developments, including the normalisation of its bilateral ties with Russia and a significant increase in demand from new potential markets, such as sub-Saharan Africa.

It is stated that the number of receivables of Turkish companies in return for their works in Libya is 4.5 billion dollars. It is not known exactly when the receivables will be

collected. Companies do great harm. companies doing business in Libya, Turkey intensity is engaged in the construction industry. There are also those who have hotel investments. Currently 180 Turkish companies doing business in Libya. TML Construction, Taşyapı, Emergence, Güriş, Kolin, Cengiz, GAP, Özaltın, Nurol and paperclips as the leading contracting companies operated in Libya. According to sector officials, only a few companies continue to operate in Libya by reducing their operations (Emlak Kulisi- 2015). In the contracting sector, Turks and secondly Italians have the great portion, and joint projects with many countries such as PRC, Brazil, Russia, Indonesia, South Korea, USA, Malta. are in progress (Turkish Ministry of Commerce, 2020).

Turkish strategic relationship and cooperation with Libya over the coming decades should be holistic to help with reaching lasting peace as well as institution and state building. Help can also cover construction across all sectors including security services reform, energy, transport, healthcare, housing, and infrastructure (Insight Turkey, 2020). However, during the Civil War, Turkish support to GNA may cause a serious problem between the relations. It is likely that the NLA will be dominant party and assume overall control of Libya in the near future Realignment of Turkish policy in Libya is required.

2.1. Turkey's Politics in the Eastern Mediterranean

Turkey is an important factor in MENA (Middle East and Northern Africa) region, especially in the Eastern Mediterranean. Turkey has economic, historical, and cultural ties with all countries in this region. Libya, on the other hand, is a country with significant oil reserves in the world and is dependent on foreign countries with its limited industry and agriculture.

This conflict is no longer just a Libyan affair. There are many other key players now involved, and all with their own interests and motivations (Open Democracy, 2021). The civil unrest and war started in 2011 and continues in Libya. While France, Egypt, Greece, Italy, Cyprus (Greek Cypriot Administration), United Arab Emirates support the GNA government at the West, Turkey, Qatar and in a limited way the United States provide support to the Libyan National Army recognized by the United Nations. This situation cannot be expected to continue forever. It is inevitable to achieve order by reaching a consensus in Libya soon with the involvement of international community. Once peace is established, the reconstruction of Libya will start immediately. The reconstruction of economic and military facilities which are approximately destroyed in the civil war is to require the transportation of thousands of tons of materials, especially for construction work materials to Libya by sea.

The LNA launched an assault on Tripoli in April 2019 and today controls large swaths of Libya's east and south. Haftar claimed military rule over eastern parts of the country in April 2020 (CFR, 2020). Opposition fighters (GNA) are still only loosely organized under the aegis of the Na-

tional Liberation Army (NLA) and are a diverse assortment of forces with low tactical capacity to fight a full-scale war. Turkey has made military intervention against the NLA in Libya which probably will be the winner party concerning tactical situation. Additionally, it could not find any ally in the region. This will create dangerous political and economic results when Turkey starts to establish ties with unified Libya.

Turkey and Libya (UN recognized GNA side) have signed a Security and Military Cooperation MOU (Memorandum of Understanding) on 27 November 2019 covering establishment of Rapid Response Force, establishment of 'Defence and Security Cooperation Office', Education, counselling, support will be given materials and planning, Allocation of Land, sea and air vehicles, weapons, training bases, Joint exercises, intelligence sharing, "peacekeeping" operations, Military equipment donation, sold or rental (KAS, 2020).

Greece has taken very careful steps on the Libyan conflict. Greek government has never involved in any intervention against any parties in Libya. This approach will assist to Greece when she establishes good relations with new formation in Libya. Işeri and Bartan (2019) makes an assessment "Contrary to Turkish policy, Greece tries to establish an alliance with all respective parties related to Eastern Mediterranean conflicts and problems".

Because of the policies implemented by Turkey, there are serious problems in political relations with all Arab countries except Qatar (Başkan, 2019) This situation adversely affects not only political but also economic relations with these countries. Turkish current policy may create serious problems in the future in terms of Turkish - Libyan relations. Libya is an important source of oil and Turkey have economic relations that started many years ago, especially in terms of construction works. Our current policies will hardly hinder the re-development of future economic relations.

Nevertheless, Turkey could be amenable to change its course in Libya if it sees an opportunity to address the driving factors for its intervention through political and diplomatic efforts. Eljarh (2020) suggests that "These include securing allies in the next unity government, receiving guarantees regarding its exclusive economic zone with Libya, reactivating billions of dollars in contracts, and establishing a direct dialogue channel with Egypt. Likewise, better engagement from Europe in relation to Turkey's concerns in the Eastern Mediterranean may also result in Ankara changing its course in Libya.

2.2. Restoration Requirement of Libya

Libya provides country's income from oil exporting. Currently, the urgent need of Libya is to rapidly repair seriously destroyed oil production facilities and to increase oil production. El Wardany (2020) assesses that "If oil exports are increased, the priority activities will be repairing heavily

damaged infrastructure facilities and rebuilding unusable dwellings because of heavy air bombing and civil war”.

As a result of its political system, the possibility of making large investments in Libya is only the government's monopoly. Currently, there are no large-scale renovation and renewal infrastructure projects planned by both existing governments in Libya. The revenues are mostly used for to meet the immediate needs of the population such as emergency aid to the people in need, execution of municipal services, repair of destroyed roads repairs and emergency repairs to make some facilities operational.

Now airport and port development have priority to keep the Libya connected to the global economy. The ports have a significant role to connect the links between consumption and production centres. The reconstruction and rehabilitation projects need construction material and machinery. Libya has not sufficient industrial facilities to produce construction material and equipment. (Abmdas, 2017). So, these materials and equipment will be procured from abroad, may be from Turkey. Transfer of all these materials will reach the ports by maritime transportation and then to construction sites by land transportation. This gives priority to rehabilitation of port and land transportation infrastructure.

The sea transportation is necessary to carry civil construction material and equipment from abroad. The container ships, Ro-Ro ships, and solid bulk carriers would be the best carriers for these kinds of material.

2.3. Libyan Economy

It is very difficult to collect reliable economic data due to the lack of order in Libya and the existence of two separate governments. For this reason, in this section, information obtained from different sources has been analysed comparatively.

The Libyan economy has recently been hit by four overlapping shocks: an intensifying conflict that suffocates economic activity, the closure of oil fields that puts the country's major income-generating activity largely on hold, decreasing oil prices that reduce income from oil production in surviving fields, and the COVID-19 pandemic (with 3,438 confirmed cases and 73 deaths as of August 2020), which threatens to further suppress the economy. A politi-

cal resolution in Libya is needed to implement the required reforms for a private sector driven growth and jobs generation (World Bank, 2020a).

The economic impact was already felt in 2019 as real GDP growth slowed sharply to 2.5%, down from what seemed a promising steady recovery during 2017–18, with a record growth performance of 20.8% on average. As military confrontations escalated, oil production decreased from 1.2 million bpd in December 2019 bpd to 0.1 million bpd in April 2020, choking the lifeline of the economy (World Bank, 2020a).

Libya is expected to produce a daily average of only 0.17 million barrels in 2020, which is less than one seventh of last year's production. As a result, GDP is expected to shrink by 41% this year. The adopted budget for 2020 partially reflects this dire situation, with a large, forecasted deficit, the highest in recent years. Likewise, the current account is expected to run astronomic deficits in 2020 (World Bank, 2020a).

Turkish- Libyan Commercial Activities are resumed in the Table 1.

Some details one import and export between Turkey and Libya are as follows:

Main export products of Turkey: Furniture, textile, jewellery, carpet, drug, cement

Main import products: Gold, Petroleum and Chemical products, scrap metals

Tourism: Number of Libyan citizens visiting Turkey: 99.395 (2017), 188.312 (2018)

The following figures shows Economic Indicators of Libya in 2017. (Turkish Embassy in Libya, 2018) (Table 2).

The main commercial partners:

Imports: Italy (15.1%), Spain, France, China (12.3%), Turkey (7.1%), South Korea (5.1%), Tunis (4.7%)

Exports: Italy (17.7%), France (13.1%), Germany (11.9%), Netherland (8.5%), Switzerland (6.1%), Spain (6.0%)

Main export products: Petroleum and Chemical products

Main import products: Machineries, Electrical and Electronic products, foods

In order to sustain the Libyan economy, it is essential to raise oil production to pre-2011 levels and to restore production and survival facilities that were almost completely destroyed during the war. For this purpose, damaged oil

Table 1. Turkish- Libyan Commercial Activities

Year	Export (Billion USD)	Import (Billion USD)	Volume	Balance (Billion USD)
2014	2.060	0.249	2.309	1.811
2015	1.420	0.196	1.616	1.224
2016	0.906	0.161	1.067	0.745
2017	0.880	0.248	1.128	0.632
2018	1.498	0.367	1.865	1.131
2019	1.963	0.478	2,441	1,485

Source: Izmir Chamber of Commerce, (2019) based on TUIK.

Table 2. Fact and Figures of Libya's Economy

GDP 105.6 billion USD	Real GDP increase: 3%
Population: 6.700.000	GNP per capita: 7.970 USD
Inflation: 12.5 %	Unemployment: 17.7%
Export (FOB): 13.8 billion USD	Import (CIF): 9.2 Billion USD

Source: Turkish Embassy in Libya, 2018.

transfer lines and port facilities must be repaired swiftly, and the damaged transportation network and social facilities must be put into operation in order to sustain normal life in the country. Unfortunately, Libya's technical infrastructure and manpower are not available for these repairs. This situation requires Libya to cooperate with other countries and get foreign technical and financial support. The countries that have done business in Libya before are already making plans for taking priority for construction work to be done in Libya. In this context, Turkey's need to make serious preparation to get contractor works in Libya. The most important factor delaying the start of contracting works is that the order in the country has not been established yet. In the future, countries aiming to do business in Libya should be very careful about the policies they follow in Libya problem and avoid practices that will create hostility. Given the extreme volatility and unpredictability surrounding the determinants of economic trends, it is not sensible to produce forecasts beyond the immediate horizon.

2.4. Ports of Libya

All infrastructure projects are funded and operated by Libyan government due to lack of private companies. Libya, government having rich petroleum and natural gas reserves, can afford renewal and repair of its highly damaged ports even road and air transportation systems. But Libyan government needs technical support from the other countries to achieve such great works (Abmdas, 2018).

With the increasing use of containers, worldwide, most container ports, regardless of whether self-automatic or automatic, utilize dock holder cranes of various sorts and details to manage seaward activities. Also, completely mechanized holder ports utilize AGVs (Automatic Guided Vehicles) to transport compartments from ocean to capacity yard and the other way around. The compartment is then stacked in the capacity yard utilizing RMG (Rail mounted gantry) crane or RTG (Rubber tyred gantry), contingent upon the affirmed gear. Inside self-loader holder ports, SC (Ship Crane) are utilized to transport and store compartments.

Port information is extracted from Maritime Database (2019). Libya has 7 combined ports (Container, General Cargo (GC), Dry Bulk & Ro-Ro), 9 liquid bulk terminals (petroleum- petrochemical and chemical cargo terminals)", 3 dry bulk ports (GC, Bulk, Small GC and Industrial ore) and 1 multipurpose terminal (petroleum, other liquids, GC, dry bulk, Ro-Ro terminal). There is no further data about the operational status of these ports. The positions

of multipurpose and energy (Petroleum) ports are shown in the Figure 3.

In Libya there is no sufficient cargo handling equipment in any of the Libyan ports. Conventional payload dealing with gear keeps on being utilized by every single Libyan port to deal with containers, other than Qasr - Ahmed port. Where the port of Qasr Ahmed has two specialized quality control cranes and two RTG, due to the shortcomings of this container handling equipment caused some limitations on its recent capacity (Abmdas, 2018). A significant part of the ports in Libya have been seriously damaged. There is an opportunity to turn their renewal and repair activities into an opportunity. While doing this, it will be suitable to benefit from the following concepts while reconstructing and renovating the port infrastructure.

It is strongly believed that Libya will start port development projects as soon as stability is established. This projects mainly will be port construction to enhance the capacity and improvement of cargo handling equipment.

Ports are changing and now becoming Logistic Industrial Zone (LIZ) providing more opportunities beyond a classical port's capabilities. Francello (2016) proposes that "LIZ should provide integrated logistics services, Value-added logistics services and sufficient IT infrastructure".

Container terminals are nodes that link with other inland transport modes such as highways, railways, and inland waterway systems (Lun et al. 2008). The role of container terminals has been evolving from a cargo handling point to a distribution centre with physical infrastructure serving as transport hubs in the container supply chain (Almotairi and Lumsden 2009). Hence, container terminals function as an interface between the areas of production and consumption servicing the players in shipping and transport-related areas (Ugboma et al. 2009). In container transport, a container terminal is a vital part of the transport infrastructure (Bichou et al. 2007).

With the outbreak of the war in Libya, western companies doing port development work here, but they could not complete their work. Italian contractors abandoned the 8 billion USD worth Benghazi port project and left the coun-



Figure 3. Libyan Ports (Source: Maritime Database, 2019).

try. This situation negatively affected the Western perspective of Libyans (Abmdas, 2018).

Turkish contractors are ready and willing to complete their unfinished projects in the country and take new projects if their rights are protected (Yapı.com.tr, 2020). Turkish contractors have an experiment to achieve construction works in Libya in the past 50 years. Turkey having 196 port and terminals, has achieved port development for 30 years and there are well-experienced 20 port construction companies in Turkey. The cooperation on this field would be beneficial for both countries.

2.5. Shipping Features of Turkey about Libya

In order to integrate Libya to global economy, maritime transportation is essential. The suitable transportation method will be container and Ro-Ro (Roll on-Roll off) ships and solid bulk carriers. Turkey has a sufficient both on container, Ro-Ro, and bulk transportation capacity. Turkish owned ships are registered convenient flag and this situation protect shipping companies refrain any sanction against Turkey. There is condense maritime traffic in the Mediterranean.

The Figure 4 shows Ro-Ro and container lines in the Mediterranean. The Grimaldi, MSC and Moby are the biggest Ro-Ro operators in the Mediterranean. Only Grimaldi operates between Greece and Libya.

The following information is extracted from IMEAK DTO Maritime Sector report (2019). This is the latest report in hand.

Turkey has an important container and Ro-Ro transport capacity in the Mediterranean. Turkey based Ro-Ro companies operate between the following lines: Pendik-Trieste (Italy), Yalova-Sete (France), Mersin Trieste as well as Patras (Greece) and Bari (Italy) are frequented places for Pendik-Trieste line. The large capacity Ro-Ro operators in Turkey are DFDS and DFDS, which started operations in 2019, has a significant Ro-Ro transportation capacity with 15 ships registered in Turkish International flag. ULUSOY

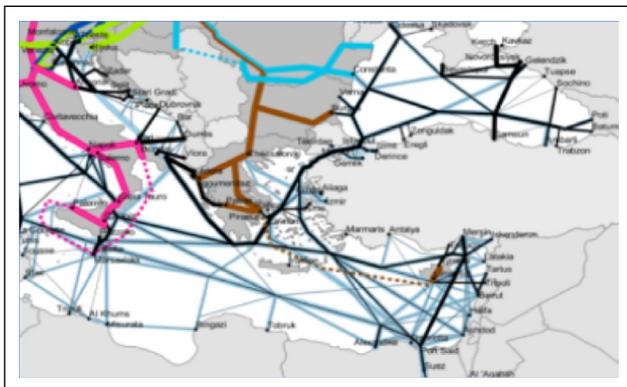


Figure 4. Ro-Ro and Container Lines in the Mediterranean (Dark-container, Light- Ro-Ro) (Source: Ro-Ro Lines in the Mediterranean, 2020).

is the second Ro-Ro company operates between Çeşme and Trieste.

ARKAS has both container handling and transportation with 126.500 TEUs capacity as well as it is the biggest and container maker and container handling operator. ARKAS operates in the Mediterranean, Black Sea, North and West Africa. Likewise, there are around 10 shipping companies specialized in bulk cargo.

In Libya, Tripoli Port is planned to be closed for cargo transportation and used only for cruise ships, and cargo transportation is planned to be shifted to the newly built Zaviye Port. In this context Turkey upon the request of Libya, will launch a new operation in the region. A new freight forwarding port will be built in Libya in the region. The Ministry of Environment and Urbanization started to collect applications from companies interested in the project. (Denizcilik Dergisi, 2021).

76.3 percent of the Turkish owned ships are registered into the convenient flags (UNCTAD, 2020) and this situation facilitates operation of these ships to Libya if Libyan prospective government applies any sanction against Turkey. In this respect, Turkey may an important role in maritime transportation. Turkish shipping companies have a great chance to get maximum benefit from sea transportation for reconstruction of Libya.

2.6. Future Prospects

Libya, which is an important oil producer, and It is not expected that the current uncertainty situation will continue for a long period. If this uncertainty continues, the internal conflict will continue, and it will be much more difficult to maintain order in the country. In this case, it is inevitable for other countries to be included in the solution process. However, it is a fact that Russia will not allow the initiation of an operation under the umbrella of the United Nations. It is very difficult to carry out an operation under the umbrella of NATO or the European Union due to the different and even conflicting political approaches of the members. Considering the new conjuncture of the world, a military intervention in Libya does not seem possible. The countries led by Germany are searching for a soft policy solution to this conflict and this approach is getting stronger.

The LNA is stronger than the GNA in terms of the size of the area it controls, its more organized military structure and the economic resources it controls as well increasing number of countries providing political support. Although the GNA seems to be the legitimate government by the UN, foreign powers now cooperate with the LNA and treat both sides as representatives of the country. In the light of the political and military situation, it does not seem possible for the LNA to gain full control over Libya with its current armed force, unless it receives military assistance from foreign powers. It is assessed that it is very difficult for the LNA to conduct a second attack for this purpose.

Many countries are in search of economic opportunities in Libya, which has a large oil income, and waiting for establishment of order in Libya as soon as possible. There are many tenders required for the reconstruction of the infrastructure of the country, which has suffered a great deal of damage, and these have whetted the appetite of the countries.

Turkey is a country that specializes in construction works and produces all kinds of construction materials. Turkish contractors have done business in Libya for more than 50 years and they are familiar with the conditions of this country. Turkish construction companies are attempting to get a tender in the region under GNA control. Especially the construction of damaged harbours and roads comes to the fore.

The materials to be used in the restoration process in Libya are construction materials and they must be procured from outside to the country that does not have the capacity to produce them. The most suitable mode for transporting this material is by sea. Considering the character of the goods to be transported to this region, suitable vehicles are Ro-Ro, Container, and bulk cargo ships. Turkey is a country experienced in all three types of transport and has suitable vehicles. The fact that the vast majority of Turkish ships are registered in convenient flag countries which. Having convenient flags will allow Turkish ships to avoid political restrictions and sanctions that may arise in the future.

However, considering the future interests of Turkey, which still maintains relations with only one side, it would be appropriate to open communication channels with the other side. For this purpose, it is also recommended to use commercial channels instead of only political channels.

3. CONCLUSION

While France, Italy, Germany, Saudi Arabia, UAE, and Egypt follow a pro-Haftar policy, Turkey and Qatar follow a pro-GNA policy. Libya policy implemented by Russia is constantly changing and trying to maintain relations with both parties. United States refrains to take part one side of the conflict. Russia's Libya policy is built on preventing the US from establishing a control mechanism over Libya. Britain tries to stay out of this conflict. It can be assumed that Haftar is better off in terms of political support.

The geography (land) controlled by Haftar is wider comparing with other party. Most of the oil sources are under the control of Haftar. Compared to GNA, Haftar has a more organized and powerful armed force. In this case, it is evaluated that Haftar can take control of Libya in the future unless there is a change in the policy and occurrence of unexpected interventions.

All Western countries even Russia are making plans to benefit from reconstruction of Libya. Existing Turkish foreign policy will create serious problems to establish fair relations with Libya. This will also hamper establishment eco-

nomical relations with Libya which may be very important for assist to handy capped Turkish economy. The establishment of a unified government will be the realistic solution for Libya. All foreign actors who have intervened in Libya, must work constructively for a single government.

Civil war and unrest continue in Libya. While this situation damaging the economy, people cannot see their future. It is imperative that civil war and public warfare be established as soon as possible, and economic activity should settle again.

The most important economic aspect for Libya is integration in the international economy. To achieve that Libya should establish a continuous shipping and open its ports for operation in a short period. To achieve this, the ports must be rebuilt and started to serve. With this speed, the needs of the people can be transported to consumption points by road. The main element of the Libyan economy is oil production facilities and ports primarily need maintenance and repair.

Realignment of Turkish policy in Libya may be possible concerning future economic opportunities in Libya. This policy ensures that relations with the next unified governments in Libya. In order for such a policy to be implemented, it will be appropriate deployment of commercial actors as well as diplomatic relations.

Turkish contractors have an experiment to achieve construction works in Libya in the past 40 years. Turkey having 196 port and terminals, has achieved port development for 30 years and there are well-experienced 20 port construction companies in Turkey. The cooperation on this field would be beneficial for both countries.

Libyan urgent need now is the rapid repair of the cities and facilities destroyed by the war. This will require a very extensive construction activity. Libyan construction material production is very limited, and these materials will be imported by the sea. For this, the suitable sea transportation method will be container and Ro-Ro and solid bulk. Turkey has a sufficient container, Ro-Ro, and bulk transportation capacity. Turkish owned ships are registered convenient flag and this situation protect shipping companies refrain any sanction against Turkey.

Likewise, Turkey has a vast experience in the construction material production capacity. When considering the geopolitical impacts, Turkey has an advantageous position to provide both construction products and transportation.

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