Rethinking Energy Security: The Carter Doctrine in a Changing Energy Landscape

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ABSTRACT

This project examines what factors underpin the continuity in US engagement in the Persian Gulf following a significant reduction in its oil imports from the region over the past seven years. This scenario presents a puzzle when considered against the criteria of the Carter Doctrine, the historic driver of US policy in the region, which has linked a direct US military presence in the Gulf to realist concerns over securing access to petroleum supplies as a matter of the US's "vital national interest." Seeing as the majority of Gulf petroleum exports now head to East Asian markets such as China, the extent to which traditional realist energy security concerns continue to inform US Gulf policy demands critical inquiry.

This study takes into account three factors for explaining continuity in the United States' Gulf policy with reference to its "special relationship" with Saudi Arabia: counter-terror strategy, regional stability vis-à-vis Iran, and energy security. A close examination reveals that although energy security does remain paramount in driving US policy in the region, traditional realist approaches to energy security as embodied in the Carter Doctrine demand reassessment in light of the changing energy landscape in the Gulf. The crucial nuance lies in expanding the scope of the US's "vital interests" as now including upholding global energy supply flows for those not considered immediate US allies such as China, indicating the emergence of liberal trends in US energy security policy. In this way, this project seeks to advance the theoretical discussion between grand IR theory and energy security more broadly.

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INTRODUCTION

Following the release of the International Energy Agency's *World Energy Outlook2012* in November 2012, a series of previously unthinkable headlines appeared across major news outlets: if current trends continue, the United States will be poised to become "the world's top energy producer" by 2020.[1] The IEA's current projections position the United States' oil-producing capacities as on path to outpace those of Saudi Arabia by 2020 and predict that US gas production quotas will overtake those of Russia, the world's largest gas producer, by 2015.[2] For a country so long subject to the vulnerabilities of energy import-dependency as the United States—with the foreign policy entanglements and wars to show for it—the implications of energy self-sufficiency would be enormous.

The data informing the IEA's projections is rooted in recent technological advances in drilling techniques that have revolutionized the energy landscape in North America in the past half-decade. Horizontal drilling and hydraulic fracturing, or "fracking," have opened up previously off-limits "tight" oil and shale gas deposits located across the United States. The industry has taken off. According to the US Department of Energy, domestic shale gas production has increased "from 1 trillion cubic feet (tcf) in 2006 to 5 tcf in 2010—about 23 percent of total U.S. dry gas production," with the Energy Information Agency reporting a twelve-fold production increase in shale gas over the past decade [3]

The development of these domestic hydrocarbon sources has had an enormous domestic economic effect in just a few short years. Since production took off after 2006, more than 1.7 million jobs have been created in the shale gas and tight oil industries, an essential boon in an era

[1] Chazan, Guy, and Ed Crooks. "US to be world's top energy producer." Financial Times. www.ft.com/intl/cms/s/0/8c2bcdf2-2c9f-11e2-9211-00144feabdc0.html#axzz2UUzRlTdy (accessed May 22, 2013).
[2] IEA. "World Energy Outlook 2012: Executive Summary." International Energy Agency. www.iea.org/publications/freepublications/publication/English.pdf (accessed May 20, 2013).
[3] "Producing Natural Gas From Shale." US Department of Energy. http://energy.gov/articles/producing-natural-gas-shale (accessed May 29, 2013).

of economic recession.[4] Effects have resonated in the global economic sphere as well. The sudden abundance of natural gas has lowered its price in the United States, which has resulted in a boost in domestic manufacturing and subsequently the rerouting of billions of dollars of investment capital from Europe and Asia to the US.[5] In short, the past five years have seen enormous shifts in the US domestic energy realm and the global economy by extension. It is for these reasons that references to shale gas as a "game changer"[6] are made.

In addition to the changes in production capacity, US supply patterns over the past six years have seen both an overall decrease in oil imports since their peak in 2005 as well as a dramatic shift in the nature of US import supply portfolio. Beginning a decade ago, Canada has taken over Saudi Arabia's historic role as the number one supplier of US petroleum imports. As of 2011, Canadian crude oil accounted for over double of Saudi exports, accounting for 29 per cent of total US petroleum net imports as compared to Saudi Arabia providing 14 per cent.[7]

What has not followed these changes in the energy sphere, however, is a corresponding shift in the nature of the United States' engagement abroad. This is curious, as concerns over the need to securing energy supplies from unstable energy-producing regions can be seen as a critical motivating factor for many of the most significant shifts in US foreign and military policy. Increased engagement with the Middle East and Persian Gulf in the latter half of the 20th century, the US's foray into the Gulf War, and the 2003 Invasion of Iraq all indicate the primacy of energy security in driving US foreign engagement. Seeing as a trend in the reverse direction—a significant lessening of American dependence on foreign oil from the Gulf—has occurred, one would expect to see some change in the security posturing of the United States in the region. Yet, the Persian Gulf remains heavily fortified with a US military presence that maintains the security

[4] Yergin, Daniel. "US energy is changing the world again." Financial Times. http://www.ft.com/intl/cms/s/0/b2202a8a-2e57-11e2-8f7a-00144feabdc0.html#axzz2UUzRlTdy (accessed May 20, 2013).
[5] Yergin, Daniel. "US energy is changing the world again."
[6] Medlock III, Kenneth. "Shale Gas: A Game-Changer with Global Implications." Baker Institute. www.bakerinstitute.org/publications/EF-WWT-MedlockShaleGas-100609.pdf (accessed May 20, 2013).
[7] EIA. "Oil and Petroleum Products: Imports and Exports." US Energy Information Administration. http://www.eia.gov/energyexplained/index.cfm?page=oil_imports (accessed May 20, 2013).

of the region's oil fields. A heavy naval and air presence safeguards the Strait of Hormuz, through which approximately 20 percent of all globally traded oil passes daily.[8]

Adding to the strategic puzzle is the role of China in the changing global energy landscape. The US is now safeguarding a strategic waterway through which over 85 percent of petroleum exports head to East Asian markets.[9] For its part, China imports approximately 51 percent of its petroleum from the Persian Gulf,[10] making the region of paramount importance to its energy security profile. Seeing as traditional definitions of energy security are grounded in realist concepts such as securing supplies for oneself and one's immediate allies, it would seem United States continuing to expend massive amounts of its defense budget on ensuring the continued flow of oil to China, which is often regarded as a chief geopolitical competitor.

RESEARCH QUESTION AND CONTEXT

This thesis seeks to investigate what factors can account for the lack of any change in the nature of US engagement in the Persian Gulf following a dramatic rerouting of energy supply patterns from Western markets to East Asian, specifically China. At first glance, the continued heavy military presence in the region and continuation of the US-Saudi partnership appears suboptimal when examined through the lens of energy security concerns that hold realist assumptions as the primary drivers of policy. That the United States would employ an exorbitant amount of its resources to securing China's supply of oil seems a radical departure from the criteria that have historically informed the US military-strategic involvement in the region—securing supplies for itself and its allies ensured by US military force, as embodied in the Carter

[8] Gholz, Eugene. "Strait of Hormuz: Assessing Threats to Energy Security in the Persian Gulf." The Strauss Center. 20 May 2013. <http://strausscenter.org/research/strait-of-hormuz-assessing-threats-to-energy-security-in-the-persian-gulf.html>.
[9] "World Oil Transit Chokepoints." U.S. Energy Information Administration (EIA). 20 May 2013. <http://www.eia.gov/countries/regions-topics.cfm?fips=WOTC#hormuz>.
[10] China- Analysis." Energy Information Administration. http://www.eia.gov/countries/cab.cfm?fips=CH (accessed May 20, 2013).

Doctrine. In this way the lack of any shift in the US engagement in the Persian Gulf presents a puzzle to realist approaches to energy security.

This project will identify a specific site of analysis within which to assess the factors underpinning US policy in the region. In terms of the US's foreign relations, perhaps no bilateral relationship has been more defined by energy considerations than that between the US and Saudi Arabia. Described as a "special relationship" within the United States' diplomatic portfolio, the US-Saudi partnership has been regarded as the most curious yet essential of the canon, characterized as a "lethal embrace" wherein regime security is traded for oil.[11] The US-Saudi relationship has historically been at the center of US Gulf strategy, functioning as the US's key ally in the region over the past six decades. Thus, we can locate and investigation of the puzzle of continued US engagement in the Persian Gulf most obviously within this partnership.

METHODOLOGY

This thesis will examine what is currently driving US engagement in the Persian Gulf, if at not exactly the historic realist energy security concerns. This question necessitates a broader investigation of US Gulf policy to examine additional motivating factors underpinning continued engagement with the region. The resulting analytical observations are then followed by a weighing exercise and reassessment of energy security concerns within that paradigm. In the concluding chapter, the theoretical implications of the research are presented with suggestions for further research.

Though the starting point for this study is why the US-Saudi relationship has not shifted in tandem with the changing energy landscape in the Persian Gulf, other factors motivating continued US engagement in the region will be examined as additional variables in the puzzle. To this end, an examination of three paramount factors will form the core of this project: US

[11] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. New York: Metropolitan Books/Henry Holt & Co., 2004.

counter-terrorism strategy, regional stability vis-à-vis Iran, and energy security. The reason for this is based on the premise that the events of the past decade—9/11, Iran's nuclear ambitions, and the Arab Spring—have ushered in a new geopolitical era wherein the US-Saudi relationship has become tied to traditional hard security concerns independent of the energy realm. Though these changes represent matters of great strategic concern to the US, they do not fully explain US engagement in the Gulf under the Carter Doctrine, which has been the primary driver of its policy in the region since the 1980s. Therefore, even accounting for the emergence of new challenges in the region, the energy factor would still remain dominant in any analysis.

Proceeding from this framework, an assessment of these three independent variables—counter terror strategy, regional stability, and energy security—will be necessary in order to open up the scope of inquiry for the assessing the main drivers the US-Saudi relationship and US engagement in the Gulf more broadly. This study begins with an empirical puzzle—significant changes in the energy landscape met with continuity in US Gulf policy—and thus takes an inductive approach towards investigating the phenomenon in an under-theorized environment. This project will employ process-tracing as its methodological approach to track the motivations underlying the dependent variable, the nature of US engagement in the Persian Gulf. A causal chain will thus be developed between independent variables and the dependent variable with theoretical implications drawn as such.

As with all social science research, there are limitations in the scope and ability of this project to account for all of the phenomena at play in explaining foreign policy behaviour. However, the key assumption that energy security has been central in motivating US foreign policy following the Second World War will first be established. A chapter on the historical background of the US-Saudi partnership across four periods—the beginnings, the Cold War, the Gulf War, and post-9/11—will thus provide the necessary foundation for an assessment of energy as a driving factor in US policy towards the Persian Gulf against additional strategic concerns that have motivated US relations with Saudi Arabia.

An additional limitation of this project is that a relatively short amount of time—approximately six years—has passed since US energy supply patterns have signalled a reduced reliance on oil from the Gulf. Seeing as a dramatic rerouting of decades-long bilateral relationship would likely take longer to manoeuvre than this time span would allot, it is perhaps too early to expect a significant shift in US-Saudi relations. However, as will be discussed in the analysis chapter, recent massive arms sales to Saudi Arabia indicate a reinvigorated partnership between the two powers. Seeing as these trends are occurring at a time when we should expect to see some degree of disengagement, a reassessment of US-Saudi relations demands critical inquiry.

It should also be mentioned that though the United States is no longer primarily dependent on Saudi petroleum exports, Saudi Arabia still ranks as its second biggest supplier. Therefore it can be said that Saudi Arabia still figures critically in the US's energy-dependence dilemma. At the same time, however, changes in the domestic production side have reduced the US's reliance on imports overall as well as a general reduction in consumption patterns following the 2008 economic collapse,[12] thereby rendering the United States "less energy-dependent" in general. Therefore the changes in the energy sphere can still be regarded as significant shift in the US-Saudi relationship.

ARGUMENT AND STRUCTURE

This project will argue that although counterterrorism strategy and concern over regional stability are themselves now central factors, energy security concerns remain paramount in driving US policy in the Persian Gulf and its strategic partnership with Saudi Arabia, though no longer in the traditional sense. A reassessment of the realist approach to energy security, as embodied in the Carter Doctrine, is the necessary nuance-modification to grand theory in light of the empirical puzzle we see in current US policy towards the Gulf. It will be hypothesized that,

[12] "U.S. Energy Information Administration (EIA)." U.S. Energy Information Administration (EIA). Web. 20 May 2013. <http://www.eia.gov/countries/country-data.cfm?fips=US>.

following trends of growing global economic interdependence, the securing of energy resources for oneself and one's allies as the conceptual underpinnings of the US's traditional energy security policy have come up for reassessment, the crucial nuance being what is understood by the term "allies." This thesis will argue that the definition of "allies" in the energy security realm has become significantly broadened, providing incentives for cooperation amongst great powers in energy policy to mitigate shared vulnerabilities of a tightly integrated global oil market. Thus, in such a scenario, China becomes an ally in the sense that upholding its energy security becomes critical to that of the United States. Following the trends seen in the Persian Gulf, it has thus become one of the "vital interests" of the United States to secure the global energy supply flow to all, representing a liberal tweaking of traditional realist approaches to energy security that has defined US engagement in the Gulf under the Carter Doctrine. In this case, shared vulnerabilities over a globally integrated oil market provide shared incentives for cooperation between the United States and China, in a sense making them allies in the energy sphere. Tthe work conducted in this study suggests that such trends indicate a liberal tweaking of the Cater Doctrine in this regard.

This thesis will accomplish its task across four chapters. The first will lay the necessary theoretical groundwork for the project by reviewing the energy security literature, illustrating energy's relation to geopolitics, economic security, and foreign policy. Next, a review of the most prominent approaches of IR theory—realism, liberalism, and Marxist and other "radical" approaches—will outline the main tenants of the theoretical approaches available for a study of energy within the IR framework. An understanding of energy security's place in motivating behavior in the international realm will thus be established. Following this section, chapter two will provide an overview of the development the US-Saudi "special relationship" across four periods: World War II, the Cold War, the Gulf War, and post-9/11, demonstrated to have been motivated by common strategic interests as well as traditional realist energy security concerns, as ultimately embodied in the Carter Doctrine by the 1980s.

In the analysis chapter, three variables will be analyzed in their capacities for underpinning the US-Saudi relationship and US engagement in the Persian Gulf. In the first two sections, Saudi Arabia's role in US counter-terror operations as well as the need to uphold regional stability vis-à-vis Iran will be assessed as non-energy related factors explaining the salience of the special relationship in the 21st century. Following this assessment, a final section will investigate how US energy security concerns continue to most crucially underpin its policy in the Gulf, though also necessitate a re-reading of the Carter Doctrine to account for an expanded scope of US "vital interests" under its conceptual umbrella. The main point put forth here will be that global economic interdependence has expanded the range of US "allies" to include states such as China, and thus indicates a more liberalist approach to energy security policy is currently being pursued under the auspices of the Carter Doctrine. In the final chapter, a summary of the study's findings is followed by a hypothesis posited for further theoretical development.

CHAPTER II: LITERATURE REVIEW

Energy Security

A standard definition of energy security is far from agreed upon.[13] For example, the Routledge Handbook of Energy Security lists over forty-five definitions of energy security, spanning the fields of public policy, environmental science, economics, technical sciences and international relations.[14] In seeking a definition within the IR framework that encompasses the main tenants of modern energy security concerns in a traditional realist framework, this thesis will adopt David Goldwyn and Jan Kalicki's definition, which describes the concept as:

> assurance of the ability to access the resources required for the continued development of national power… it is the provision of affordable, reliable, diverse, and ample supplies of oil and gas (and their future equivalents)—to the United States, its allies, and its partners—and adequate infrastructure to deliver these supplies to market."[15]

Following this definition, this chapter will first provide an overview of the key concepts underpinning energy security such as geopolitics, economic security, and foreign policy considerations and provide examples of their salience in global affairs. Within that framework, this section will also refer to so-called "energy politics," which energy scholar Brenda Shaffer defines as how "a country's ability to access energy supplies and the ways in which it uses energy crucially determine the state of its economy, its national security, and the quality and sustainability of its environment."[16] Though not interchangeable as concepts, energy security and energy politics will be regarded as highly integrated under a general "security" umbrella.

Having presented an overview of the main issues of energy security, the final sections of this chapter will then describe the various strands of energy scholarship and allocate them within three main theoretical approaches of IR—realism, liberalism, and Marxist and "radical" approaches, highlighting and evaluating their purchase power in accounting for the energy/IR

[13] Valentine, Scott Victor. "The Fuzzy Nature of Energy Security." In The Routledge Handbook of Energy Security. Abingdon: Routledge, 2011. p56-70.
[14] Sovacool, Benjamin. "Introduction." In The Routledge Handbook of Energy Security. Abingdon: Routledge, 2011. p3-6.
[15] Kalicki, Jan, and David Goldwyn. "Introduction." In Energy & Security: Toward a New Foreign Policy Strategy. Washington, DC: Woodrow Wilson Center Press, 2005. p9.
[16] Shaffer, Brenda. Energy Politics. Philadelphia: University of Pennsylvania Press, 2009. p1.

relationship. Of these main approaches, this thesis will highlight realist approaches to energy security as a theoretical framework in chapter three to illuminate the conceptual underpinnings of the Carter Doctrine in driving US Gulf Policy. In the final analysis, liberalist elements—such as mutual dependence and vulnerability as motivation for cooperation—will be illustrated as seeping into US energy security policy, informing a crucial shift in US energy security policy that explains perceived discontinuities in how energy security considerations are currently driving US policy Persian Gulf. This chapter will thus lay the theoretical groundwork from which to approach the explanandum of this project—the nature of US-Saudi relations vis-à-vis traditional realist approaches to energy security.

The Geopolitics of Energy

The conceptual core of modern day energy security's place in the realm of national strategy and thus international relations can be traced back to the eve of World War I, when then First Lord of the Admiralty Winston Churchill ordered switching the feedstock of the Royal Navy from domestically-produced coal to imported Persian oil.[17] Divorcing Great Britain's energy supply from dependable domestic production introduced the first principle of energy security in the 21st century: diversification of sources. According to Churchill, Great Britain's national energy strategy would lie in one key principle: "Safety and certainty in oil," he argued, "lie in variety and variety alone,"[18] the logic being that any disruptions in one source of supplies could be offset by supplemental supplies from other sources. The principle of diversification—importing one's energy resources from multiple suppliers—has since served as the core principle guiding the energy security strategies of major powers dependent on imported oil.

The case of the United States is quintessential in this regard. After becoming a net oil importer following World War II, the story of US energy security has largely been one of strategic vulnerabilities resulting from a dependence on "supplier" nations often unstable or hostile to

[17] Yergin, Daniel. "Ensuring Energy Security." Foreign Affairs 85, no. 2 (2006): p69.
[18] Yergin, Daniel. "Ensuring Energy Security." p69.

American interests. Energy scholars such as Michael Klare have drawn attention to how the United States' import dependencies pose a myriad of national security threats. The United States' "dependency dilemma" creates a framework wherein the US is inclined to make political concessions it would not otherwise, such as supporting unsavory regimes at the international level and providing them with arms sales, intelligence support, and military protection (most notably Saudi Arabia).[19] Moreover, a US military presence in overseas energy-producing regions gives rise to new security threats in and of itself, ensnaring the US in foreign wars (the Gulf War) or by necessitating a US military presence in regions highly resented by local populations. [20] In short, the concept of import dependency in the energy realm implies a compromised security position and imposes certain constraints on state behavior.

The events of the last half-century have wedded the energy and global politics spheres such that a shift in one realm carries significant ripple effects in the other. The major trends of the post-Cold War era—globalization and the advent of terrorism—have rendered the old conceptual underpinnings of the US approach to energy security (ensuring uninterrupted supply from producer nations) too narrow in scope for the challenges of the 21st century. In a 2006 *Foreign Affairs* article, energy expert Daniel Yergin details the need for expanding the definition of energy security to account for changes in the global strategic landscape. [21] In addition to today's "exceedingly tight oil market and… high oil prices," Yergin notes a set of new global threats—terrorism, new geopolitical rivalries, fears over dwindling resource supplies—on the one hand, while emphasizing the most fundamental shift on the other: "energy interdependence and the growing scale of energy trade requir[ing]… collaboration among both producers and consumers to ensure the security of the entire supply chain."[22] Thus, mirroring the growing economic interdependence of globalization, the conceptual boundaries of energy security are no longer

[19] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. New York: Metropolitan Books/Henry Holt & Co., 2004. p11.
[20] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p11.
[21] Yergin, Daniel. "Ensuring Energy Security." p69-82.
[22] Yergin, Daniel. "Ensuring Energy Security." p78.

confined to the national realm as an issue of security energy supplies for one's own domestic needs. Rather, due to increased economic integration, it is now in the national interest to uphold global energy supply flows for all. Thus the broader relationship between energy and economic realm constitute a major component of a new era of energy security.

Energy and Economic Security

These economic trends are further reflected in the global oil market. In addition to being the "most traded commodity in the world," oil is also a fungible commodity, meaning that producer and consumer are often indirectly linked, and changes anywhere in supply and demand patterns affect the overall price for everyone.[23] "Thus," as Shaffer notes, "the dynamics of the global energy market increase interdependency between states in the international system."[24]

In contrast to oil, which can be shipped by tankers across oceans and is guided by global market forces, natural gas is primarily transported through pipelines connecting states and through bilateral contracts. The reality of a global gas market emerging is increasingly being discussed, particularly following the apparent successes of the shale gas revolution in carving space for unconventional gas in global energy markets as well as the continuing potential of liquefied natural gas (LNG) for transporting natural gas long distances sans pipeline infrastructure.[25] Gas currently comprises a 21% share of the global energy mix following oil and coal[26] and is the "world's fastest growing primary energy source."[27]

The importance of energy resources to the global economy can hardly be overstated. The principle energy resource of the 20th and 21st centuries, oil, is the essential lifeblood of the global economy. Perhaps no event has illustrated this more starkly than the 1973 Oil Crisis. In

[23] Shaffer, Brenda. Energy politics. p15.
[24] Shaffer, Brenda. Energy politics. p15.
[25] Apte, Sharad, and Julian Critchlow. "Are We on the Edge of a Truly Global Gas Market?." Bain & Co. www.bain.com/Images/BAIN_BRIEF_Are_we_on_the_edge_of_a_truly_global_gas_market.pdf (accessed May 1, 2013).
[26] International Energy Agency. "IEA - Gas FAQs." IEA . http://www.iea.org/aboutus/faqs/gas/ (accessed May 15, 2013).
[27] Shaffer, Brenda. Energy politics. p13.

retaliation for US military support of Israel during the Yom Kippur War, the members of OPEC unilaterally raised the price of oil by 70%, enforced production cutbacks, and declared an embargo on oil to the US. OPEC's actions disrupted everyday life in the United States, causing mass fuel shortages, quadrupling the price of oil, and significantly worsening the global recession and inflation already occurring following the breakdown of the Bretton Woods agreement. The economic vulnerabilities inherent in dependency on foreign oil were made clear, prompting policymakers to propose the building of the U.S. Strategic Petroleum Reserve as an emergency cushion to mitigate the wider economic destruction should such a supply disruption occur again.

Indeed, an entire realm of energy security studies is devoted to investigating energy security externalities in the global economy, highlighting the "magnitude of the macroeconomic costs of oil price shocks" and weighing the larger "adjustment costs" throughout the economy due to significant changes in the price of oil.[28] In a research project sponsored by the US Department of Energy to, experts Douglas Bohi and Michael Toman propose two hypotheses as to why the global oil market is particularly unstable: one, that "the market is dominated by a cartel of the Organization of Petroleum Exporting Countries (OPEC) and this cartel can manipulate the price to achieve economic or political objectives," and two, "that the short-term price elasticities of petroleum supply and demand are so low that the price of oil moves in large quantum jumps when either supply or demand suddenly change."[29] Thus the oil market differ importantly from other commodity markets on two accounts closely ties to politics. The political aspects of the global oil market vis-à-vis OPEC (and other nationalized oil industries such as Russia, for example) are obvious. Though at first glance appearing consigned to the economic realm, the "tight" nature of the global oil market can be instrumentalized to achieve political goals. One showcase example of this would be Iran and Iraq's threat to cease oil exports in 2002

[28] Bohi, Douglas R., Michael A. Toman, and Margaret A. Walls. The economics of energy security. Boston: Kluwer Academic Publishers, 1996. p73.
[29] Bohi, Douglas R., Michael A. Toman, and Margaret A. Walls. The economics of energy security. p74.

in support of the Palestinian cause.[30] Though exports were not halted, the mere threat caused a massive increase in the price of oil, introducing significant instability into global markets. That the roots of the mini-crisis were informed by political choices, however, speaks to how the economic dimensions of energy have significant implications for global affairs.

As events such as the Iran-Iraq threats in 2002 and the 1973 OPEC embargo demonstrate, energy is a sphere wherein power can be exercised in an equally effective manner as in the more general realm of traditional global politics. For example, the withholding of crucial energy supplies can threaten the stability of a state to a similar detrimental degree that, say, a military attack can. Yet such activities do not mirror the power structure of the international system, as the energy sphere is void of the regulatory frameworks that govern traditional global politics. That a group of energy-producing nations, dubbed a "a belligerent conglomerate of camel-riding emirates" by the Washington Post following its formation in 1960[31] could inflict such economic hardship and thus present a national security threat to the United States is a testament to the unique relationship between energy and economic security and its placement in the wider scheme of international relations. It is no wonder, then, that recent literature in the field highlights "the dominant perspective of national energy security over the past few decades has been rooted in economic rationality."[32] It must be remembered, however, that as "energy and politics are intrinsically linked,"[33] any significant events in the economic sphere are bound to resonate in the international affairs realm.

Energy and Foreign Policy

One key issue with regard to the relationship between energy and foreign policy is how events consigned to the energy sphere translate into significant changes in the global strategic

[30] Shaffer, Brenda. Energy politics. p34.
[31] "The Secret of the Seven Sisters - Special series." Al Jazeera English. http://www.aljazeera.com/programmes/specialseries/2013/04/201344105231487582.html (accessed May 5, 2013).
[32] Valentine, Scott Victor. "The Fuzzy Nature of Energy Security." p61.
[33] Shaffer, Brenda. Energy politics. p1.

landscape and thereby shape the nature of US engagement in key regions. We can see this trend most starkly in a brief tracing of instances where changes in the energy sphere have in turn prompted a series of major domestic and foreign policy initiatives in the case of the United States. A quick look at key historic events over the last half-century reveals that systemic shifts in the energy sphere have been followed by corresponding shifts in US foreign policy.

First and foremost it should be established that no other strategic commodity has been so explicitly linked to US national security as has been the case with oil. A heavily import-dependent nation, the US is in an extremely insecure position vis-à-vis any significant changes in the global energy environment. As described earlier, no event illustrated this vulnerability more clearly than the 1973 OPEC oil embargo. OPEC's obliteration of the old oil trade under the "Seven Sisters" was a major systemic change in the energy sphere with significant implications in the larger IR sphere. No longer would the seven major western oil companies control the global oil market, colluding to set global oil prices and effectively controlling the market. Following October 1973, the system became dominated by oil-producing *nation-states* under the umbrella of OPEC, deeply politicizing the global economy of oil and posing significant new challenges to import-dependent states such as the United States.

Following this structural shift in the energy realm, the first major step towards linking energy security with national security in US policy was made. In response to the exposed vulnerabilities of relying on foreign—and often unfriendly or unstable—nations, President Richard Nixon announced the so-called "Project Independence," a title chosen to evoke a national security quest on par with the Manhattan Project,[34] which called for a set of domestic policies designed to reduce US dependence on foreign oil and eventually achieve energy self-

[34] U.S. Department of Energy. "Energy Timeline: from 1971 to 1980". http://www.energy.gov/about/timeline1971-1980.htm (accessed May 25, 2013).

sufficiency.[35] From this point forward, "energy independence" became a political mantra, serving as a top national security goal for every subsequent American president.

Another such historic policy shift followed the Soviet invasion of Afghanistan and the 1979 Iranian Revolution. The potential for US oil interests in Persia to be threatened by Soviet expansion prompted the first explicit linkage between US military and energy policies embodied in the "Carter Doctrine." Referring to Cold War geostrategic concerns over Soviet movements as well as the regional instability following the 1979 Iranian Revolution, President Jimmy Carter formalized the linkage between energy and national security in his 1980 State of the Union address, which stated that "an attempt by any outside force to gain control of the Persian Gulf region will be regarded as an assault on the vital interests of the United States of America, and such an assault will be repelled by any means necessary, including military force."[36] Thus initiated the long-term commitment of US strategic forces to the Persian Gulf region, which had heretofore been absent.

In short, what can be concluded from a glance at the history of energy security issues and US policy responses can be that a systemic shift in the energy sphere has been followed by a significant policy reaction. This is rooted in the fact that energy dependence creates a situation wherein an import-dependent country requires a broadened national security policy to include issues consigned to the energy sphere. One trend that these events additionally reveal is that the energy policy/foreign policy relationship suffers from a lack of coordination.

Policymakers in the United States, most notably perhaps Bill Richardson, former Secretary of Energy under President Clinton, have highlighted the lack of coordination between energy and foreign policy, criticizing US policy as taking an "ad hoc" approach to US energy and

[35] Homans, Charles. "Energy Independence: A Short History" Foreign Policy. http://www.foreignpolicy.com/articles/2012/01/03/energy_independence_a_short_history (accessed May 05, 2013).
[36] "The Carter Doctrine"." Air Force Mag. http://www.airforcemag.com/MagazineArchive/Pages/2010/April%202010/0410keeper.aspx (accessed May 5, 2013).

foreign policy goals and calling instead for a closer integration of the two.[37] A more integrated, forward-thinking foreign policy approach to energy-producing regions would proactively mitigate the threats for which the sphere of energy security is designed to account. Instead, US foreign policy towards regions such as the Middle East has historically supported repressive regimes in the name of maintaining access to energy resources. The US-Saudi relationship is case in point. The US-Saudi "special relationship" has been characterized by Saudi Arabia capitalizing on its oil supplier position to elicit US military protection and support for its domestic politics.[38] This special arrangement between the two countries has given rise to an array of security threats to the United States, such as building resentment amongst the local population over the American military presence to safeguard oil interests.

In order to explain what appears to be a significant disconnect between US energy security policy and broader US foreign policy initiatives in practice, the scope of analysis must be widened to account for additional motivating factors for US policy in these regions that may illuminate security interests beyond energy. An overview of the main theoretical approaches of IR and their ability to account for energy is first necessary to highlight both their potential and limitations in explaining what motivated US engagement in the Persian Gulf vis-à-vis traditional energy security concerns.

The Debate on Energy and IR

As previously mentioned, the under-theorized relationship between energy and US foreign policy can be traced back to a lack of coordination both in policy practice as well as in the realm of IR theory. A review of the most prominent approaches of IR theory will illuminate the main tenants and expectations for tracing energy's bearing on US engagement in key strategic energy-producing regions. From this exercise, various frameworks of expectations will be

[37] Richardson, Bill. "Foreword." In Energy & Security: Towards a New Foreign Policy Strategy, xviii-xi. Washington, DC: Woodrow Wilson Center Press, 2005.
[38] Kalicki, Jan and David Goldwyn. Energy& Security: Towards a New Foreign Policy Strategy. Washington, DC: Wilson Center Press. 2005. p5.

developed for application to a case study of US involvement in the Persian Gulf, highlighting the shortcomings of the main strands of IR theory to account for the relationship between US foreign policy and energy considerations.

Realism

Perhaps the most attractive IR theory for application to security and resource concerns, realism immediately offers itself as having the most purchase for tracing energy's role in guiding foreign policy. This is due in large part to realism's easy marriage with geopolitics, which centralizes the spatial and physical aspects of resource access and control within its analytical approach. Within these basic assumptions, great powers' national interests are depicted as being primarily informed by the need to secure key geographic locations as defined by resource allocation. These concerns take the form of employing the military to maintain the openness of vital "choke points" in the global supply flow (Strait of Hormuz and Strait of Malacca, for example) as well as the security of infrastructure such as oil and gas pipelines traversing geostrategically sensitive regions. The realist tradition also emphasizes states' propensity to enter into zero-sum competition with other great powers over access to finite resources.

The figurehead of this school, Michael Klare has coined the term "resource wars" to describe the overarching trends of the post-Cold War world order as one defined by competition between great powers over access to critical resources such as oil, gas, and water.[39] The key assumptions underpinning this approach are: one, that "peak oil" (ever-dwindling global supplies of oil) is becoming a reality, and two, that the era of peak oil is coinciding with a significant increase in demand for energy resources, as "rising" powers such as China and India place new demands on global energy supplies to fuel their economic growth.[40] The quest is then to secure access to the world's remaining energy-rich regions with potential for increased production in an

[39] Klare, Michael T. Resource wars: the new landscape of global conflict. New York: Metropolitan Books, 2001.
[40] Klare, Michael T. Rising powers, shrinking planet: the new geopolitics of energy. New York: Metropolitan Books, 2008.

era of decline. This in turn leads to competition amongst great powers for influence in resource "frontier" regions such as Central Asia and Africa.

As referenced previously, Klare's additional work highlights the additional destabilizing effects that the global distribution of oil and gas supplies have. As the world's largest hydrocarbon reserves are often located in politically corrupt, unstable, and conflict-prone regions, energy-dependent great powers such as the US are thereby ensnared in relationships with unsavory regimes. [41] In meeting demands for arms sales, military and surveillance technology transfers, and providing support for often unpopular regimes, dependence on oil and gas from these regions perpetuates instability, the logic goes, and ultimately compromise US security. [42]

Liberalism

For its part, liberalism offers a broader scope in that it includes decision-makers beyond the state, accounting for commercial interests, market measures, and frameworks such as regime type as all mattering IR behavior. The main aim is to search for trends in global energy governance. To this end, liberalism locates energy in the interplay between politics, economics, and international relations. Liberal analyses of global energy therefore have the tendency to expose the inner workings of the energy realm, many of which have been revealed to be unsavory. Following this theoretical approach, the world of energy is structured such that there are strong incentives on all sides—political and economic—to support poor institutions, corruption, and undiversified economies. Research exposing the "resource curse," the development of rentier states, and environments fostering resource (civil) wars has all occurred under the umbrella of liberal approaches to energy studies. Renown economist Paul Collier synthesizes these issues in his widely-read work *The Bottom Billion*, which explores how countries endowed with significant resource wealth often suffer from an undiversified economy deriving its

[41] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. New York: Metropolitan Books/Henry Holt & Co., 2004.
[42] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency.

primary source of wealth from resource extraction (resource curse), poor governance resulting from the state deriving its income from outside rents and thus unaccountable to its citizens (rentier state), and a predisposition to civil war stemming from resource control disputes.[43] Essentially, liberalist approaches locate the roots of conflict the energy sphere presents in institutionalized practices.

To counter the unsavory trends that their research has highlighted, energy scholars of the liberal tradition have thus called for greater transparency and international regulation of global energy. Often this has come in the form of non-governmental organizations (NGOs) devoted to oversight of corrupt practices and promoting transparency within energy-related issues in politics and global affairs. Other suggestions have taken on a "governance solutions for governance issues" approach. With the field's emphasis on institutions, noted liberalism scholars such as Robert Keohane have emphasized the stabilizing potential of global energy regimes.[44] The establishment of the International Energy Agency in response to the 1973 OPEC embargo is one such example of liberalist approaches in practice. The establishment of the IEA was seen as a means of bolstering the energy security of major OECD import-dependent countries through facilitating coordinated policy responses to energy crises.

Marxism and "Radicalism"

Marxist approaches to energy politics are rooted in central assumptions about the global capitalist economic order. Though varied in their focus, Marxist takes hold assumptions about the structure of the international system—unfair economic distribution among states under global capitalism—as their fundamental analytical starting point. Dependency theory is one key theory from this school which has been applied to the energy realm. The work of Ray Hinnebusch has traced the role of the Middle East's oil resources in shaping the region into raw

[43] Collier, Paul. The bottom billion: why the poorest countries are failing and what can be done about it. Oxford: Oxford University Press, 2007.
[44] Keohane, Robert O. "The International Energy Agency: State Influence and Transgovernmental Politics." International Organization 32, no. 04 (1978): p929-951.

material export-dependent countries with undiversified economies, peripheral and dependent on the "core" Western-world.[45]

Marxist and associated "radical" approaches widen to include a breadth of additional theoretical investigations as to how energy resources play out in the liberal economic order. Much of this work builds on basic assumptions of the liberal tradition (resource curse, resource dependency) but adds layers of complexity by taking an interdisciplinary approach and drawing from additional fields that cover the intersection of economics, technology, and politics—most notably geography. The work of Andrew Barry, for example, has applied critical social theories such as actor-network theory to investigate additional forces at play—such as the "governance of technology" that can help account for a larger picture of what can cause conflict in the resources realm.[46] Michael Watts has also broadened the site of analysis to include actors operating at the sub-national, national, and international levels. In tracing the intersection between international and national corporations, local communities, in his research on the nature of oil industry in the Niger Delta, Watts has added prominence to the role of sub-state communities in the larger picture of dependency theory.[47]

Recent work by geographers Gavin Bridge and Philippe Le Billion has positioned the role of international oil companies at the center of analysis, tracing the producer-consumer relationship as it plays out in the larger picture of the geopolitics of energy.[48] In focusing on the role of oil firms, such an approach allots agency to the industry side of the energy realm and can therefore search for explanatory power within production chains. Given the demonstrated ripple effects that events in the oil and gas industries have in the political sphere, approaching the

[45] Hinnebusch, Raymond A. The International Politics of the Middle East. Manchester: Manchester University Press; 2003.
[46] Barry, A. "Technological Zones."European Journal of Social Theory 9, no. 2 (2006): p239-253.
[47] Watts, Michael. "Petro-Insurgency Or Criminal Syndicate? Conflict & Violence In The Niger Delta." Review of African Political Economy 34, no. 114 (2007): p637-660.
Watts, Michael. Liberation ecologies. 2nd ed. London: Routledge, 2004.
Peet, Richard, Paul Robbins, and Michael Watts. Global Political Ecology. London: Routledge, 2011.
[48] Bridge, Gavin, and Philippe Billon. Oil. Cambridge, UK: Polity Press, 2013.

energy realm from the vantage point of industry dynamics and producer-consumer relationship represents an important analytical lens to the field.

Where to locate energy?

In their focus on structural explanations over agency, realist and Marxist approaches are attractive at the macro level for analyses of resource distribution and geopolitical competition over access and control. The trade-off in the realist approach specifically is its failure to account for the full breadth of forces at play in the IR/energy relationship, such as the nuances of decision-making at the individual level. For their part, Marxist and other radical approaches employ a broader scope to account for multiple scales of analysis (local-national-international) as well as more nuanced account of transnational actors such as oil and gas companies within the energy sphere. In addition to locating the energy industry as a site of analysis, scholars from the Marxist/radicalist camp have traced the importance of sub-state actors such as rebel groups, local governments, and local communities as factors shaping global energy politics.

Liberalism offers itself as a go-to approach for projects that place agency at the forefront of energy issues. Liberalism is thus able to account for a myriad of actors—both state and non-state—by highlighting institutions, regime type, and commercial interests, liberal approaches are limited in that they tend to gloss over actors at the local level, preferring instead to locate agency at the institution or regime level. In emphasizing institutional cooperation, liberalism is fundamentally at odds with realism over the concepts within the energy sphere it highlights. Where realist approaches focus on resource wars and geostrategic competition, liberalism focuses on sources of cooperation with regard to energy as prompting the institutionalization of relationships via regimes.

In terms of analyzing the extent to which energy considerations informs US engagement in the Persian Gulf, this thesis will adopt realism as potentially holding the most explanatory power. The main tenants of realism—military power, the deterministic powers of resource

distribution, zero-sum competition over access—on the surface appear to inform US engagement in the Persian Gulf. These trends can be traced back to the very beginnings of the US-Saudi relationship, in which energy and military interests coincided to give birth to one of the most special strategic partnerships in the United States' foreign relations portfolio and were later embodied in official US Gulf policy as embodied by the Cater Doctrine.

But as a close reading of US-Saudi relationship and US engagement in the Persian Gulf in the 21st century will illustrate, the degree to which traditional realist approaches to energy security can be seen as continuing to underpin the US Gulf strategy under the Carter Doctrine is up for reassessment. The re-routing of the majority of Gulf petroleum exports to East Asian markets such as China

lessened energy-dependence of the US in recent years should, by the logic of realism, have coincided with a gradual retreat of the US's security posturing in the region. Yet this is not the case. Instead of a neo-isolationist US, we still have a heavy military presence, increased diplomatic visits. This project will trace whether this is due to the role of energy or not- energy matters, but in ways that are not so obvious (it's in the US's interest to uphold supply flows to China) while accounting for other factors, such as counter terror/curbing Iran. Carter Doctrine as the ultimate realist energy security definition-linking military power with the denial of energy resources to an adversary, the Soviet Union. Now the global energy landscape has changed- ref Yergin again.

CHAPTER II: HISTORY OF THE US-SAUDI RELATIONSHIP

This chapter will provide an overview of the history of the US-Saudi relationship, beginning with the forays of American companies into Saudi oil exploration in the 1930s up to the beginning of the 21st century, following the 9/11 terrorist attacks. As a look at the history will demonstrate, the defining feature of the US-Saudi relationship is that was not a colonial one.[49] Rather, the development of US-Saudi relations was a mutually-pursued process defined by the importance of Saudi oil, common enemies during the Cold War, and a bargained security agenda between the House of Saud and the United States.

Though often characterized as an unshakable "special relationship" born of both economic and strategic interests,[50] there have been notable pendulum swings in US-Saudi relations. Saudi Arabia's participation in the 1973 OPEC oil embargo as well as the instability following the terrorist attacks of 9/11 have highlighted fissures in the partnership and threatened to undermine relations. This chapter will illustrate how US policy intertwining energy policy and security commitments have driven US-Saudi relations over the 20th and 21st centuries. A changed post-9/11 global strategic landscape presenting new security threats will be illustrated as having offered the exact nature of the "special relationship" up for reevaluation.

The Beginnings

Americans first entered the region with the advent of the oil industry. In need of a large sum of money and gold to fund existing debt, King Ibn Saud awarded the first contract for oil exploration on Saudi territory to the American Standard Oil of California (SOCAL)—soon after the California Arab Standard Oil Company (CASOC) — in 1933.[51] A few years later, oil deposits were discovered, and the drilling of commercially viable oil quotas began.

[49] Lippman, Thomas, and Joanne Myers. "Inside the Mirage: America's Fragile Partnership with Saudi Arabia." Carnegie Council for Ethics in International Affairs. http://www.carnegiecouncil.org/studio/multimedia/20040602/index.html (accessed May 25, 2013).
[50] Yergin, Daniel. The prize: the epic quest for oil, money, and power. New York: Free Press, 2009. p409.
[51] Rasheed, Madawi. A history of Saudi Arabia. New York: Cambridge University Press, 2002. p91-92.

On the one hand, revenue from Saudi Arabia's early oil business proved crucial in overcoming the financial crises plaguing the Kingdom at that time. On the other, the development of the oil industry brought an inflow of non-Muslim foreigners to the region—a contentious issue. Thus following the advent of Saudi oil industry two important processes began: growing numbers of "infidels" coming to the Kingdom as well as the beginnings of "a major material transformation."[52] Indeed, the critical linkage between Saudi oil revenues and the development of a modern state and economy soon became evident as semblances of both began to emerge, though also causing significant instability in the traditional society.[53]

The Second World War interrupted the production of Saudi oil, stunting an industry still far from emerging as a serious player in the energy realm. Yet significant interest in Saudi Arabia's oil potential did pick up due to shifts in the global supply sphere. In providing the Allies with petroleum feedstock during World War II, the United States began to face a reduced production capacity. US policymakers began looking to Saudi Arabia as a potential player in supplementing future supply.[54] Prompted by ARAMCO (Arabian American Oil Company, the replacement title for CASOC), two Saudi princes visited Washington in 1943 to present total Saudi oil reserves as comprising 20 billion barrels, approximately the same amount of the total proven reserves in the United States at the time.[55] In February 1944 the US government announced plans for the future construction of a trans-Saudi oil pipeline routed to the Mediterranean coast.[56]

At the same time, Saudi Arabia began to figure in the United States' grander geostrategic designs. In 1943, President Roosevelt extended arms and military equipment to Saudi Arabia under the Lend Lease program, declaring that "the defense of Saudi Arabia is vital to the defense

[52] Rasheed, Madawi. A history of Saudi Arabia. p92.
[53] Niblock, Tim. Saudi Arabia power, legitimacy and survival. London: Routledge, 2006. p40-41.
[54] Yergin, Daniel. The prize: the epic quest for oil, money, and power. New York: Free Press, 2009. p377-378.
[55] Rasheed, Madawi. A history of Saudi Arabia. p104.
[56] Ottaway, David. The king's messenger: Prince Bandar bin Sultan and America's tangled relationship with Saudi Arabia. New York: Walker & Co., 2008. p11.

of the United States."[57] The US-Saudi relationship was thus officially branded a strategic partnership, and so followed the official opening of full diplomatic relations between the two nations. A burgeoning US geostrategic role in the region followed, slowly replacing that of the British.[58] From this point on, the United States began aggressively pursuing designs for an air base in the region to use in World War II operations as well as for future commercial flights. Per the US Department of War's proposal in 1944, plans for the building of the American air base in Dhahran were set into motion.

Thus the early years of the US-Saudi relationship were defined first by the foray of American oil companies into the region, which played an instrumental part in the development of the Saudi oil industry. Following the Second World War, a set of geostrategic interests emerged that positioned Saudi Arabia prominently within US policymakers' designs. The US sought both future sources of abundant petroleum to fuel its post-war growth[59] as well as a strategic foothold in the region during the Cold War. For their part, the Saudis were eager to pursue relations with the United States in exchange for US promises to uphold Saudi Arabia's defense against foreign and domestic threats.[60] In a region of "heavily armed neighbors" and subject to domestic sources of political instability, the security of Saudi oil fields and transit infrastructure as well as that of the Saudi royal family was at the top of the Saudi bargaining agenda. [61] Following these shared interests, the essential foundations for US-Saudi relations were laid.

The Cold War

Building upon these interests, Saudi Arabia and the United States passed a series of defense agreements in the post-war years. Negotiations were ongoing between the two powers,

[57] Ottaway, David. The king's messenger: Prince Bandar bin Sultan and America's tangled relationship with Saudi Arabia. p11.
[58] Lippman, Thomas, and Joanne Myers. "Inside the Mirage: America's Fragile Partnership with Saudi Arabia."
[59] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p37.
[60] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p38.
[61] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p38.

wherein the Saudis essentially proposed an "oil-for-security pact,"[62] while the US haggled for lengthier leases on an air base in Dhahran than the Saudis wished to grant. The two parties eventually signed a long-term mutual defense agreement wherein US access to the air base in Dhahran would be exchanged for arms and military training.[63] Thus, the defense relationship between the two powers was one defined not only by US guarantees of providing security for the kingdom but also one aimed at building the Saudis own defense capabilities. To this end, billions of dollars' worth of arms sales, military training, and advisors to the Saudis occurred under the auspices of the Nixon Doctrine. [64] The US policy of bolstering the Saudis' own defense capabilities is particularly important in order to identify the circumstances that would later prompt direct US military involvement in the Persian Gulf (for example, the issuance of the Carter Doctrine and the Gulf War) and result in the establishment of a permanent US military presence in Saudi Arabia.

It is important to note that cooperation during the Cold War period was defined by more than a mere defense-for-oil exchange. Communism and Arab nationalism served as shared security threats, buoying a strategic US-Saudi partnership over the next four decades. Saudi Arabia joined the United States in funding anti-communist movements throughout the globe, notably the Mujahedeen in Afghanistan.[65] Following nationalist leader Gamal Abdel Nasser's rise in Egypt, King Saud allotted to side with the United States, hoping to position Saudi Arabia as the Gulf's leader against communism and Arab nationalism.[66] Thus US-Saudi policies resembled those of a traditional Cold War alliance.

Saudi Arabia's geographic location also figured prominently in the US's Cold War strategy. With its location not far from the Soviet Union, the Dhahran air base was an important

[62] Ottaway, David. The king's messenger: Prince Bandar bin Sultan and America's tangled relationship with Saudi Arabia. p14.
[63] Ottaway, David. The king's messenger: Prince Bandar bin Sultan and America's tangled relationship with Saudi Arabia. p14.
[64] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p43-44.
[65] Lippman, Thomas, and Joanne Myers. "Inside the Mirage: America's Fragile Partnership with Saudi Arabia."
[66] Bronson, Rachel. Thicker than oil: America's uneasy partnership with Saudi Arabia. Oxford: Oxford University Press, 2006. p74-75.

component of the US's strategy of containment. Following the end of the Second World War, justifications for renewing the lease on Dhahran shifted from the need to maintain a line of bases to access the Far East to Dhahran value as a potential "post-strike base" following an attack on the Soviet Union.[67] After the fall of the shah in Iran, Saudi Arabia's importance as an anti-communist ally and as a geographic buffer against the Soviets in the Persian Gulf centralized the Kingdom's position in the US's Cold War security policy.[68]

In addition to Cold War geostrategy, oil continued to crucially underpin the relationship between the two powers. Saudi production capacity underwent exponential growth following the end of World War II. Between 1946 and 1976, Saudi oil output jumped from approximately 60 million barrels—at the time a mere 3 percent of US output—to 3.1 billion barrels, a fifty-two fold increase from its 1946 quota.[69] Having become the world's top oil exporter, Saudi Arabia functioned as a critical "swing producer" in the global market. As such, the Saudis maintained an oil policy that guaranteed low oil prices to support economic growth in the United States and Europe.[70] Given the critical role that petroleum played in the United States' post-war economic growth, the importance of this element in the US-Saudi relationship can hardly be overstated. Following the fall of the shah in Iran, the disappearance of Iran as an energy-producing ally for Western powers further elevated Saudi Arabia's profile in this regard.

It is important to note that though a growing strategic partnership was indeed taking place, there remained a degree of uncertainty and caution between the two powers. These tensions became visible at various stages throughout the Cold War era. The Saudis remained skeptical of the degree to which they could rely on the United States to ensure their security. Such trepidation was not without cause. For example, to this day, the Saudis have not hesitated to remind the US that, in the wake of the Iranian Revolution, a squadron of F15 aircraft that the US

[67] Bronson, Rachel. Thicker than oil: America's uneasy partnership with Saudi Arabia. p57.
[68] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p46.
[69] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p37.
[70] Rasheed, Madawi. A history of Saudi Arabia. New York: Cambridge University Press, 2002. p140.

dispatched to Saudi Arabia was publically revealed to be unarmed.[71] The exact nature and depth of the US-Saudi relationship has often been uncertain.

But until 9/11, no rough patches were as significant as Saudi Arabia's participation in the 1973 OPEC oil embargo. Though finding key areas of cooperation throughout the decades, Saudi Arabia and the United States remained deeply at odds over the Israel-Palestine issue, though disagreement has largely been overcome to this point. However, in protesting US support for Israel during the Yom Kippur War in October 1973, Saudi Arabia joined other OPEC producers in imposing an embargo on oil exports headed to US. The extent of the economic disruption that resulted from the embargo starkly revealed the failure of US policy in the region to ensure energy security—continued supply at affordable prices. The pursuit of US energy security policy through special strategic partnerships such as that with Saudi Arabia required reassessment. The immediate answer seemed to lie in turning inward, relocating US energy security policy domestically. As discussed in the previous chapter, President Nixon's launch of "Project Independence" proposed a set of domestic policies aimed at reducing energy consumption and promoting efficiency as an initial step towards independence from foreign oil.

Yet, as Daniel Yergin writes, "the shift of power in the world oil market in the 1970s was only part of a larger drama that was taking place in global politics."[72] Just as energy policy initiatives were looking to extricate the US from overreliance on Persian oil, events in Iran and of the wider Cold War would ensure an increased US military commitment to the region. The Iranian Revolution and the Iran Hostage Crisis of 1979 unleashed waves of anti-American sentiment in the region. These events combined with the threat of a Soviet push into the region following its invasion of Afghanistan were perceived as threats to the security of the region's oil fields. [73]

[71] "Interviews - Brent Scowcroft | Saudi Time Bomb? | FRONTLINE ." PBS: Public Broadcasting Service. http://www.pbs.org/wgbh/pages/frontline/shows/saudi/interviews/scowcroft.html (accessed May 26, 2013).
[72] Yergin, Daniel. The prize: the epic quest for oil, money, and power. p683.
[73] Yergin, Daniel. The prize: the epic quest for oil, money, and power. p683.

The prospect of losing the Saudi oil fields prompted President Jimmy Carter to formally commit the United States to the role of regional security guarantor. Declaring the Persian Gulf a "vital" interest of the United States', the so-called Carter Doctrine outlined the US's direct security commitment to the region, defending it "by any means necessary, including military force." Carter then ordered the development of the Rapid Deployment Joint Task Force, a defense unit comprised of army, air force, and naval elements focused on securing the Persian Gulf, which was later absorbed under the United States Central Command (CENTCOM) umbrella. The development of a rapid deployment force in the Persian Gulf represented the US's first military commitment to the region and expanded scope of US national security interests as explicitly linked to oil.

Henceforward, the Carter Doctrine's under-lying principle—any threat to the stability of oil production and flow from the Gulf as a fundamental threat to US national security—would frame the US-Saudi relationship through the last quarter of the 20th century. Following this policy were public affirmations of the United States' commitment to the security of the House of Saud. In 1981, President Ronald Regan issued a public statement confirming the partnership, warning that "There is no way that we would stand by and see [Saudi Arabia] taken over by anyone who would shut off the oil.[74]

The Gulf War

The most significant test of the Carter Doctrine followed Iraq's invasion of Kuwait in August 1990. To American policymakers, the move signaled an attempt by Saddam Hussein to take control of the region's oil supplies. An objective assessment reveals there would have been much truth to this, as achieving control of Kuwait would allot an additional 10 percent of global oil reserves to Iraq, making it the world's "dominant oil power."[75] President George H. W. Bush

[74] Quoted in: Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p48.
[75] Yergin, Daniel. The prize: the epic quest for oil, money, and power. p754-755.

made no secret of concerns over the region's oil fields and the security of Saudi Arabia in the face of the nearby invasion. In a televised address announcing the launch of US military involvement in the First Gulf War, President Bush explicitly cited US dependence on Gulf oil as the chief justification.[76] Also of primary concern was the US-Saudi special relationship, as Bush reiterated "the sovereign independence of Saudi Arabia is of vital interest to the United States. This decision … grows out of the longstanding friendship and security relationship between the United States and Saudi Arabia."[77]

Though King Fahd was initially hesitant to allow foreign troops on Saudi soil, [78] Operation Desert Shield and Desert Storm was launched with full US-Saudi cooperation, quickly succeeding in driving Iraqi forces out of Kuwait. The United States had met its first serious challenge to the Carter Doctrine, confronting a threat to its energy security as tied to the Gulf with a show of military force. Things were not so simple for the Saudis, however. The arrival of 500,000 US troops in addition to significant air and naval forces exposed Saudi Arabia's dependence on the United States for its security, elicited strong criticism from its population as a humiliation and, among many religious scholars, an inappropriate reliance on non-Muslims.[79]

The beginning of the 1990s was an era of transition for the US-Saudi relationship. On the one hand, the two powers had worked together to drive Saddam Hussein's troops from Kuwait. On the other, the end of the Cold War meant the disappearance of anticommunism as a strategic pivot point for the relationship. Even the success of the Gulf War posed mixed results. A joint operation between the US and Saudi Arabia restored stability in the Gulf, but a lingering US military presence in Saudi Arabia extended the partnership to an uncomfortable degree for the Saudis.

[76] "Confrontation in the Gulf; Excerpts From Bush's Statement on U.S. Defense of Saudis." The New York Times. http://www.nytimes.com/1990/08/09/world/confrontation-in-the-gulf-excerpts-from-bush-s-statement-on-us-defense-of-saudis.html (accessed May 28, 2013).
[77] "Confrontation in the Gulf; Excerpts From Bush's Statement on U.S. Defense of Saudis." The New York Times. http://www.nytimes.com/1990/08/09/world/confrontation-in-the-gulf-excerpts-from-bush-s-statement-on-us-defense-of-saudis.html (accessed May 28, 2013).
[78] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. 51.
[79] Rasheed, Madawi. A history of Saudi Arabia. p164-165.

The ultimate goal of US policy in the region under the Carter Doctrine had been reached, however. Following the establishment of a series of permanent US air bases in Saudi Arabia under Operation Southern Watch, threats to the oil fields of Kuwait and Saudi Arabia would be assuaged for the foreseeable future.[80] This strategic goal came at a price, however. Maintaining a US military presence in Saudi Arabia served as a rallying point for al Qaeda,[81] the consequences of which would be revealed ten years later.

Post-9/11

Following a decade of status-quo stability, the events of September 11th catapulted the US-Saudi relationship into the spotlight. When it was revealed that 15 out of the 19 suicide hijackers were Saudi citizens, relations between the two powers plummeted to the lowest point in history, as suspicions of potential Saudi knowledge of the attacks or, at the more extreme end, links to terrorist financing swirled in the US.[82] At the official level, the partnership remained intact. The Saudi government condemned the attacks and offered its partnership in the US's newly-launched "war on terror."[83]

The relationship became deeply strained, however, as tensions that had existed beneath the surface for years suddenly came to the surface. Bombings within Saudi Arabia signaled the risk the government was taking by continuing to allow a US military presence in the Kingdom.[84] There was also the continued legitimacy of the Royal family to consider, prompting the Saudis to reevaluate the value of the special relationship.[85] For the first time in history, the "Faustian bargain between Riyadh and Washington"[86] seemed to be doing more harm than good.

[80] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p53.
[81] Hoagland, Jim. "The True Cost of Oil." The Washington Post. 25 Nov. 2001: B.07. Print. 30 May 2013.
[82] Okruhlik, Gwenn. "Conflicting Pressures: Saudi Arabia." Global responses to terrorism 9/11, Afghanistan, and beyond. London: Routledge, 2003. p145-146.
[83] Okruhlik, Gwenn. "Conflicting Pressures: Saudi Arabia." p145.
[84] Schneider, Howard. "Bombing in Saudi City Kills American; Monarchy Braces for Eruption of Popular Dissent Against U.S.." The Washington Post 7 Oct. 2001: A.01. Print.
[85] Ottaway, David, and Robert Kaiser. "Saudis May Seek U.S. Exit; Military Presence Seen as Political Liability in Arab World." The Washington Post 18 Jan. 2002: A.01. Print.
[86] Hoagland, Jim. "The True Cost of Oil." The Washington Post. 25 Nov. 2001: B.07. Print. 30 May 2013.

The events of 9/11 and subsequent deterioration of US-Saudi relations occurred at a time of increasing US dependence on foreign oil. US petroleum imports were reaching an all time high, and the majority of it was on Saudi crude.[87] Moreover, after a decade of low prices and abundant oil, rising oil prices in the early 2000s signaled an era of potential change in global energy markets.[88] US policymakers raised alarm over the United States' preparedness to meet an almost certain pending energy crisis.[89]

Energy once again surfaced in Washington as a matter of vital national interest. Two weeks after taking office, President George W. Bush ordered the creation of the National Energy Policy Development Group, an energy task force whose mission was to: "to develop a national energy policy designed to help the private sector, and, as necessary and appropriate, State and local governments promote dependable, affordable, and environmentally sound production and distribution of energy for the future."[90] Headed by vice president Dick Cheney, the "Energy Task Force" put forth a comprehensive "National Energy Policy," a lengthy report assessing trends in global energy sphere with subsequent recommendations for a remaking of US energy policy. Though very detailed over the course of its 169 pages, one theme was central: the United States would likely remain dependent on oil imports from the Persian Gulf for the foreseeable future. Within this region, the NEP prominently listed Saudi Arabia as the key supplier for future US needs, highlighting its unparalleled spare oil production capacity and ability to "mitigate the impact of supply disruptions in any region."[91] Though the report outlined the need to diversify

[87] Parry, Ian, and Joel Darmstadter. "The Costs of U.S. Oil Dependency." *Resources for the Future.* www.rff.org/documents/rff-dp-[87]03-59.pdf (accessed: 30 May 2001).
[88] Fuerbringer, Jonathan. "THE MARKETS: Market Place; Oil Price Exceeds $30 a Barrel For the First Time Since 1991." *The New York Times - Breaking News, World News & Multimedia.* 15 Feb. 2000. http://www.nytimes.com/2000/02/15/business/markets-market-place-oil-price-exceeds-30-barrel-for-first-time-since-1991.html. (accessed: 31 May 2013.)
[89] Kahn, Joseph. "Energy Chief Sketches Plans To Curb Rules Limiting Supply" *The New York Times - Breaking News, World News & Multimedia.* N.p., 20 Mar. 2001. http://www.nytimes.com/2001/03/20/us/energy-chief-sketches-plans-to-curb-rules-limiting-supply.html. (accessed: 31 May 2013.)
[90] "Overview- National Energy Policy." DOE - National Energy Technology Laboratory: viii. http://www.netl.doe.gov/publications/press/2001/nep/nep.html (accessed May 29, 2013).
[91] "Chpt 8: Strengthening Global Alliances- National Energy Policy." DOE - National Energy Technology Laboratory: Home Page. http://www.netl.doe.gov/publications/press/2001/nep/nep.html (accessed May 29, 2013).

sources in the Caspian, Africa and Latin America, the focus of Washington's revamped energy policy would remain on the Gulf.

To meet its 21st century energy challenges, Washington embarked on what Klare describes as "the strategy of maximum extraction," which consisted of "a series of policies that together formed a blueprint for political, economic, and military action in the Gulf… call[ing on] American officials to exhort friendly regimes to open their energy sectors to the investment by foreign companies." [92] The strategy outlined a broad national energy policy that required close coordination between US oil firms and US diplomatic officials.[93] Thus, US policy towards Saudi Arabia at this time would be characterized by a precarious balancing act. How could an aggressive economic energy policy with Saudi Arabia at the center be maneuvered at a time of such deep political tensions? Moreover, critical appraisals of the royal family and Saudi society began to emerge,[94] fueling worry amongst some policymakers over the stability of the Kingdom and thus its role as a stable supplier to the West.

The US-Saudi Relationship Going Forward

Coming into the 21st century, the deteriorated state of US-Saud relations revealed that decades of shared strategic interests—an oil-for-security pact, a common Cold War agenda, and a shared interest in regional stability—had served as an overriding architecture that had glossed over significant underlying fragilities. The Saudis now faced the difficult task of navigating their own domestic terrorist backlash (such as the May 2003 bombings in Riyadh) following their counter-terror alliance with the United States and continued allowance of a US military presence in the Kingdom. Paradoxically, it became clear that the US military presence—initially installed to ensure stability in the region—was now doing more to compromise the stability of the region than to secure it.

[92] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p83.
[93] Klare, Michael T. Blood and oil: the dangers and consequences of America's growing petroleum dependency. p83.
[94] MacFarquhar, Neil. "New Challenge to Saudis" The New York Times. 14 May 2003. Web. 30 May 2013. <http://www.nytimes.com/2003/05/14/international/middleeast/14SAUD.html>.

As for the Americans, the US-Saudi relationship in the early-2000s took on a dual nature: on the one hand, an increased reliance on Saudi oil combined with an aggressive counter-terror strategy made the strengthening the partnership more important than ever. On the other hand, the United States' ability to directly secure the Kingdom's oilfields vis-à-vis the Carter Doctrine would have to be re-thought, following the Saudis' reluctance to renew the United States' air force operations, which were subsequently relocated to Qatar in 2003. The US-Saudi special relationship was poised for reevaluation. As Ottaway writes, the partnership could be expected to approach the security challenges of the post-9/11 era proceeding on a "piecemeal basis" rather than a "grand strategy alliance," as had been the case the following six decades.

CHAPTER III: ANALYSIS

Following the challenges the US-Saudi relationship faced after 9/11, overlapping areas of strategic interests have continued to buoy US-Saudi relations into the 21st century. Over the past decade, Saudi Arabia and the United States have forged a strong anti-terror partnership that has coordinated intelligence sharing as well as precipitated the reestablishment of a physical US presence in the Kingdom. For its part, Iran's pursuit of nuclear weapons has given rise to shared concerns over regional stability and has given US military presence in the region additional significance. Though they are both important drivers of US military policy in the Gulf, these factors alone fail to account for the continued heavy military presence in the region. This stems from the fact that, as illustrated in the history of US-Saudi relations, the establishment and continuation of a US military presence in the Persian Gulf has occurred in line with official US Gulf strategy as embodied in the Carter Doctrine, which cites US energy security concerns as the primary driver of policy. As a close consideration will reveal, this remains the case today.

Through examining three preeminent factors that account for continuity in US Gulf policy in the face of noted changes in the energy realm, this chapter will argue that, though curbing Iran and counter terror operations could help explain the lack of a shift in US Gulf engagement, matters of energy security remain paramount in both its military policy in the region and in key aspects of the US-Saudi special relationship in the 21st century. There are several reasons for this. First, though the United States has significantly reduced its overall energy dependence as previously described, the US continues to rely on Saudi Arabia as its second biggest supplier of foreign oil. Second, although recent changes in the global energy landscape would seem to challenge the conceptual core of the Carter Doctrine, this chapter will illustrate how the US's tremendous one-sided military expenditure in the Gulf that largely serves to uphold oil supply flows to China does not signal a radical break from the policy. Rather, this scenario prompts a re-reading of the Carter Doctrine against the changing realities of energy security in the 21st century. This chapter will argue that energy security concerns continue to motivate US

engagement in the Gulf as before, but that the forces of global interdependence have expanded the definition of America's "vital interests" to include ensuring the energy security of states often depicted as geopolitical competitors, such as China.

Counter Terrorism Strategy

This section will examine Saudi Arabia's role in US counter-terror strategy as a non-energy related factor explaining the salience of the special relationship. Though initially fragile immediately after 9/11, the US-Saudi relationship has become strengthened through the shared challenge of global terrorism. Although the United States was clearly al Qaeda's primary target, Osama bin Laden's repeatedly denounced the Saudi regime and was a threat to domestic stability.[95] The two powers therefore hold al Qaeda as a common threat.

Both the events of 9/11 and subsequent domestic attacks in Saudi Arabia[96] revealed serious flaws in the Saudi internal security apparatus. In tackling the Kingdom's internal terrorism threat, an extensive Saudi security apparatus developed as "a complex mix of paramilitary and internal security forces, and an equally complex legal system for dealing with civil and security cases."[97] Saudi domestic efforts focused on cutting terrorist financing, raiding suspected terrorist compounds, and rounding up and arresting known terrorist figureheads within the Kingdom.[98] The US-Saudi partnership deepened in promoting these efforts over the past decade. Following King Abdullah's 2005 trip to the US, counter terror efforts served as the bedrock for the creation of a joint ministerial committee and three working groups on issues also including education and

[95] Niblock, Tim. Saudi Arabia power, legitimacy and survival. (London: Routledge, 2006) p159.
[96] BBC. "Saudi bombing deaths rise." BBC News. http://news.bbc.co.uk/2/hi/middle_east/3022473.stm (accessed May 31, 2013).
[97] "Saudi Counter Terrorism Efforts." *Center for Strategic and International Studies*. (Washington, DC. 2005) p22.
[98] "Saudi Counter Terrorism Efforts." *Center for Strategic and International Studies*. (Washington, DC. 2005) p9-20.

consular affairs.[99] The US and the Saudis have also built "a 35,000-member force" to secure the Kingdom's oil fields, which has been repeatedly targeted by al Qaeda.[100]

Yet military cooperation over counter terror efforts only progressed to a certain point. The Saudis faced a challenge in balancing military-strategic cooperation with the United States while keeping in mind the risks of allowing a US military presence back on Saudi territory. An editorial in the Washington Post in 2001 highlighted "the contradictions that lie at the heart of relations" between the US and Saudi Arabia, specifically the Saudis hosting a US command center used for directing operations in Afghanistan yet being "afraid to tell the Saudi people that it is providing this support."[101] In the end Saudi concern won out. Following the air base's closure and subsequent relocation to Qatar in 2003, the Saudi government has been reluctant to allow a US military presence back on its territory, focusing mostly on joint-exercises, training, and arms deals instead.[102]

In March 2013, the revelation of a secret CIA-operated drone base in Saudi Arabia indicated that a much closer cooperation between the two powers has since been taking place behind the scenes. Though operated by the CIA and thus not technically "military" by definition, some of the most high-profile drone attacks—such as the September 2011 operation that killed US citizen Anwar al-Awlaki in Yemen—have been launched from the base,[103] lending it strong military overtones. Considering the risks inherent in allowing such controversial operations on Saudi soil, the royal family's dramatic deviation official Saudi policy that speaks to the preeminence of the US-Saudi strategic partnership. This is particularly obvious, given that the closure of the US base outside of Riyadh—a large gesture born of concerns over domestic legitimacy—occurred a mere eight years prior to the inception of the drone base.

[99] "Saudi Arabia: Strategic Partnership with the United States." Wilson Center. http://www.wilsoncenter.org/event/saudi-arabia-strategic-partnership-the-united-states (accessed May 31, 2013).
[100] Ottaway, David. "The King and Us: US Saudi Relations in the Wake of 9/11." *Foreign Affairs* 88, no. 3 (2009): p126-127.
[101] "Reconsidering Saudi Arabia." *The Washington Post.* (Washington, DC: November 11, 2001) pB06.
[102] Ottaway, David. "The King and Us: US Saudi Relations in the Wake of 9/11." p127.
[103] BBC. "CIA operating drone base in Saudi Arabia, US media reveal." BBC. http://www.bbc.co.uk/news/world-middle-east-21350437 (accessed May 31, 2013).

Thus the importance of Saudi Arabia's role in the United States' counter terror strategy has been at the forefront of the relationship following the events of 9/11 and can be depicted as independent of energy considerations. But this security element of the US-Saudi relationship would not justify or necessitate such a massive military presence in the region on its own, given both the elusiveness and pervasiveness of the global terrorism threat. Moreover, with the exception of Afghanistan, US counter terror operations have taken on the more narrow-focused form of joint-exercises and training of local forces on the ground or drone bases, which are pin-point policies that stand in contrast to the massive US air and naval presence that, though important for counter terror strategy in the event of an emergency, is geared toward grander geostrategic concerns.

Curbing Iran

One such geostrategic interest emerges in the case of Iran. Following the public announcement of Iran's nuclear program in 2002, serious concerns emerged in Washington over the potential for Iran to become a nuclear power. Such a situation would dramatically reorient the strategic balance in the region and present a dire security threat to chief US ally, Israel, as well as upset Saudi Arabia's hegemonic position in the Persian Gulf. Moreover, following the US invasion of Iraq and the installation of a Shiite government, the critical "bulwark against Persian penetration into the Sunni Arab world" vanished after a centuries-long stabilized Sunni-Shiite regional balance.[104] An emboldened Iran is thus of additional concern in regards to Saudi Arabia's role as the main Sunni counterweight in the Persian Gulf. As a top global oil producer itself, Iran would likely attempt to secure a more dominant role over "the flow and price of oil," which would unseat the Saudis' central position in regional energy security.[105] Moreover, some Arab Gulf states fear plans of an Iranian "strategy of encirclement… from its presence in Iraq and

[104] Ottaway, David. "The King and Us: US Saudi Relations in the Wake of 9/11." p123.
[105] Yergin, Daniel. The quest: energy, security and the re-making of the modern world. (New York: Allen Lane, 2011) p305.

subversion among the Shia populations in Bahrain and eastern Saudi Arabia and in Yemen to promoting insurgency on Saudi Arabia's southern border to financing and supplying weapons to Hezbollah in Lebanon and Hamas in Gaza."[106]

As the Iranian leadership has shown no signs of halting its program in light of strong international pressure, curbing Iran's nuclear ambitions has climbed to the top of Washington's global security agenda. Given the shared security concerns, the US-Saudi relationship has taken on an additional shared site for cooperation into the 21st century. With its geostrategic location, Saudi Arabia has historically figured centrally in US military strategy with regard to Iran and Iraq, having hosted both the air bases and operations centers from which Iraq was "monitored and attacked" and Iran's "activities checked." [107] Indeed today the United States is closely monitoring Iran via drone surveillance programs.[108] Although the origins of these unmanned flights are unknown, given the Kingdom's history of hosting US missions aimed at checking Iran combined with the recent revelation of a CIA drone base inside the Kingdom, one can speculate that Saudi Arabia is serving as a launch pad for the United States' Iran surveillance program.

The Iran-Sunni-Shiite issue plays into larger concerns over the US military posture in the region. In Bahrain, the Shia majority have been suppressed by the Sunni minority in power with tacit US approval in the interest of securing the US' Naval Support Activity Base. Home to the United States' Fifth Fleet and the US Naval Forces Central Command, the NSA Base is the largest of its kind in the region and has figured centrally in US-Iranian tensions as they steadily rise. The stand-off between Iran and those who oppose its nuclear ambitions and support strong sanctions has manifested itself in Iranian threats to block the Strait of Hormuz accompanied by symbolic demonstrations of its naval capabilities. The United States' naval presence in the Gulf

[106] Yergin, Daniel. The quest: energy, security and the re-making of the modern world. p206.
[107] Niblock, Tim. Saudi Arabia power, legitimacy and survival. (London: Routledge, 2006) p159.
[108] Reuters. "Iran says repelled unidentified plane from its airspace." Reuters. http://www.reuters.com/article/2012/11/09/us-usa-iran-drone-idUSBRE8A71C520121109 (accessed May 31, 2013).

has been instrumental in countering these threats, as antagonistic Iranian moves are quickly countered by corresponding CENTCOM operations launched from the base in Bahrain.[109]

Thus, there is a demonstrated use of the US's military capabilities in region to counterbalance Iran's hegemonic ambitions and antagonistic behavior, and certainly a strong naval and air presence in the region sends a strong symbol of the United States' commitment to maintaining the Saudi-slanted status quo against Iranian threats to rebalance the region. Yet, as a closer look at both the nature of US military engagement in the Gulf in general and will illustrate, the main policies aimed at countering Iran ultimately stem from classic energy security concerns: reliable, affordable, and secure delivery to the global market.

Energy Security

Having become important drivers of US policy in their own right over the past decade, both the counterterrorism and Iran factors do not themselves fully account for the nature of current US military engagement in the Gulf. Rather, as a look at the energy picture will reveal, US Gulf policy continues to be defined within its historic guiding principle, the Carter Doctrine. As such, energy security continues to serve as the principal driver of its continued engagement in the Persian Gulf and in buoying the US-Saudi special relationship. Although the classic concern of securing access and supply for US consumption remains a top concern, several new important trends have reshaped the traditional realist approaches to US energy security as embodied in the Carter Doctrine. These trends can be traced to the role of China in the energy picture as well as the contextual role of increasing global economic interdependence.

First and foremost, though the United States has become less energy dependent than it has been in decades, the US still relies on Saudi petroleum for 14 percent of total imports, making Saudi Arabia its second biggest foreign supplier after Canada. Thus the US is still critically

[109] Stewart, Phil. "U.S. military moves carriers, denies Iran link." Reuters. http://www.reuters.com/article/2012/01/11/us-usa-iran-military-idUSTRE80A29L20120111 (accessed May 31, 2013).

dependent on Gulf oil for its own supplies, and this fact alone justifies the continued presence of a heavy military presence to guard US "vital interests" under the framework of the Carter Doctrine.

Yet the question of what impact the shale gas/tight oil "revolution" will have on levels of US engagement in the Persian Gulf and the nature of the US-Saudi special relationship looms large in the media, policy circles, and the IR field. As it is still relatively early in the game, predictions remain speculative, though often taking dramatic form. The IEA's forecast of a United States capable of unseating the Saudis as top global oil producers has so far prompted an array of pessimistic reactions in the media and amongst scholars in the global affairs realm. In this camp, many assess the shale gas/tight oil revolution as threatening to undermine US-Saudi relations, as they see the crucial motivating factor—energy cooperation—turning into a sphere of competition rather than the historic cooperative, symbiotic relationship.[110] There is worry over the market effect, as the recent increase of the global supply of oil has sent "shock waves" through oil markets and prompted OPEC suppliers to reevaluate production quotas to balance supply and demand and maintain a national balance of payments.[111]

Many pessimists view recent US-Saudi arms sales as further evidence of a waning partnership. For example, recent US-Saudi arms deals, such as the 2010 sale of $60 billion in fighter jets and helicopters—the largest in United States history—, serve as a strong indication to many that the US plans to recede as regional security guarantor, expecting the Saudis to take a more proactive role in managing their own defense.[112] Yet all the initial hype aside, the big picture indicates the US military presence will be there to stay. Recent arms sales are not indicative of a reduced commitment to Saudi Arabia security; rather, they are a bolstering supplement to the

[110]CNBC. "US Energy Boom Is Great, Unless You're the Saudis." CNBC. http://www.cnbc.com/id/100739228 (accessed May 31, 2013).
Luft, Gal. "To Drill or Not to Drill." Foreign Policy. http://www.foreignpolicy.com/articles/2013/05/27/to_drill_or_not_to_drill_saudi_arabia_united_states_oil (accessed May 31, 2013).
[111] Financial Times. "US shale threatens to divide Opec." Financial Times. www.ft.com/cms/s/0/f500a2d6-c7ad-11e2-9c52-00144feab7de.html#axzz2V8krTMtg (accessed May 31, 2013).
[112] Gardner, Timothy. "Saudi-U.S. relations to withstand N. American oil boom." Reuters. http://www.reuters.com/article/2013/04/30/usa-saudi-idUSL2N0DH00620130430 (accessed May 31, 2013).

overarching US military posture paradigm, a renewal of the Carter Doctrine in the face of new threats to Gulf oil supplies. Though Iran inevitably poses more of an immediate threat to Saudi security than to the geographically distant United States, Iran remains a direct threat to US "vital interests" at their core.

This is nowhere more obvious than in the case of Iran's threats to block Strait of Hormuz and US policy reactions. The Strait of Hormuz is the world's most critical choke point, as roughly 20 percent of "all oil traded worldwide" annually passes through the narrow waterway.[113] Here the grander game of geopolitics comes into play in the energy sphere. The dilemma that Strait of Hormuz poses is a geopolitical one: a very narrow sea lane that can be blockaded by a belligerent power. As the IEA notes in its annual global energy outlook:

> Growing trade has the virtue of consolidating global interdependence; but it brings the risk of short-term supply interruptions, particularly if geographic supply diversity is reduced and reliance on a few strategic supply routes is increased. In the New Policies Scenario, an increasing share of global oil trade is set to transit through the Straits of Hormuz, the world' most important maritime oil-shipping route, where oil transportation rises from close to 18mb/d in 2010 (or 42% of global trade in oil) to almost 25mb/d in 2035 (or 50% of projected trade)."[114]

Thus Iran's threats to block the Strait of Hormuz hold a degree of credibility that threaten the "vital interests" of the United States under the criteria of the Carter Doctrine. This combined with actual provocative naval demonstrations by Iran's navy and corresponding US naval maneuvers[115] as well as the recent bolstering of US Gulf forces with high-tech weaponry aimed at

[113] EIA. "World Oil Transit Chokepoints." U.S. Energy Information Administration (EIA). http://www.eia.gov/countries/regions-topics.cfm?fips=wotc&trk=p3 (accessed May 31, 2013).
[114] *World energy outlook, 2012*. (Paris: OECD/IEA, 2012) p79.
[115] Schreck, Adam. "US Navy's new floating base gets a workout in Gulf." The Big Story. http://bigstory.ap.org/article/us-navys-new-floating-base-gets-workout-gulf (accessed May 31, 2013).

specifically Iranian capabilities[116] indicate an increased US military commitment in the face of Iranian threats to the flow of Gulf oil.

Thus it can be said that the essence of the Carter Doctrine is alive and well in continuing to guide US Gulf policy. What *has* changed, however, is the Doctrine's scope. Shifts in the energy realm over the past few decades have reflected trends of growing economic interdependence, most notably the integration of China into the global oil market following its transition from energy self-sufficiency to oil importer. What this has meant is the shifting of the goal posts for US energy security, or rather their expansion, in the face of these trends. As Daniel Yergin notes:

> The current model of energy security, which was born of the 1973 crisis, focuses primarily on how to handle any disruption of oil supplies from producing countries. Today, the concept of energy security needs to be expanded to include the protection of the entire energy supply chain—an awesome task."[117]

Indeed, some of the most informed commentary on the changing global landscape following the shale gas/tight oil revolution in the US has reemphasized oil's status as a "strategic commodity," subject to market volatility that presents a fundamental threat to all players in the global economy, producing and consuming states alike. So long as there remains both "global price benchmarks and no easy substitute for petrol as a transport fuel," disruptions to the supply chain will remain the paramount concern of US energy security policy.[118] The importance of upholding global supply flows takes ever more precedence in US energy security designs as US dependence on its own imports from abroad declines. Essentially, as Ed Morse from CitiGroup notes, though there has been a shift in the specific case of US energy supply patterns, the situation remains that

[116] Fisher, Max. "Video: New Navy laser can shoot down drones, is headed for the Persian Gulf." Washington Post. http://www.washingtonpost.com/blogs/worldviews/wp/2013/04/09/video-new-navy-laser-can-shoot-down-drones-is-headed-for-the-persian-gulf/ (accessed May 31, 2013).
[117] Yergin, Daniel. *Ensuring Energy Security*. p78.
[118] "Balance of power shifts in changing world of oil." Financial Times. www.ft.com/intl/cms/s/0/3fa97bf8-1dce-11e2-8e1d-00144feabdc0.html (accessed May 31, 2013).

"from a security perspective—in a world of global terrorism and cyber warfare—the borders of the US are effectively global anyway."[119]

We can see then in the energy sphere that mutual vulnerability is providing motivation for cooperation—and this is rooted in the fact majority of supplies head to Asian markets. Economic interdependence and globalization make maintaining energy security in the Gulf not only about securing imports for the US and its immediate allies—hence the China factor. Iran's threat to the Strait of Hormuz would be just as significant a threat to US security if it did not rely on Gulf oil at all for its imports. As Yergin notes:

> an assault on the flow of oil today would be an attack not just on the West, as might have been the case two decades earlier, but also on the East, including China, which gets about one quarter of its oil from the Gulf. Here is one strategic point where U.S. and Chinese interests as consumers collide.[120] (Quest: 303)

Thus, as described earlier in chapter two, energy is a sphere that cannot always be driven by a pursuit of self-interest that would result in a classic zero-sum security dilemma amongst great powers, as realism posits. One key reason for this is that the integrated nature of global oil markets constrains such state behavior. The framework of achieving security for oneself at the expense of others in the energy realm does not fit, because achieving "energy security" in an era of a highly integrated global oil market means more than security supplies for oneself. Rather, the definition of energy security has been expanded to include "the protection of the entire energy supply chain and infrastructure."[121]

Thus it is in the vital national interest of the United States to uphold global supply flows, spending staggering sums of its annual defense budget to guard critical sea lanes, such as the Strait of Hormuz, through which the majority of oil exports head for East Asian markets and,

[119] "Balance of power shifts in changing world of oil." Financial Times. www.ft.com/intl/cms/s/0/3fa97bf8-1dce-11e2-8e1d-00144feabdc0.html (accessed May 31, 2013).
[120] Yergin, Daniel. The quest: energy, security and the re-making of the modern world. (New York: Allen Lane, 2011) p303.
[121] Yergin, Daniel. Ensuring Energy Security. (Foreign Affairs 85, no. 2 2006) p78.

notably, potential geopolitical "rival" China. What we would see in the case of a realist explanation would be the use of energy for leverage in the US-China relationship, as the question of what the United States achieves if not relative gains remains unanswerable under strict realist framework. Essentially, what we see here is that the major trends of the post-Cold War world—globalization and growing economic interdependence—have put the traditional realist explanations of energy security up for reappraisal, as an examination of current US policy in the Gulf reveals.

Importantly, the criteria of this study's empirical puzzle still satisfy all tenets of Goldwyn and Kalicki's definition of energy security.[122] This is, however, first contingent on the refinement of the term "ally." One could argue that current US Gulf policy fulfills energy security goals under the need to "deliver supplies to market," and thus the US military presence could be justified as achieving energy security in that respect. The sticking point lies in fact that China is often depicted as a budding challenger to US world hegemony and thus not an "ally." What the empirical trends then reveal is that a broadening of the definition of ally—and thus the range of potential allies—has taken shape based on global trends pushing for a liberal refinement of this aspect of energy security. Reflecting increasing global interdependence, US energy security policy as seen in the Gulf has now taken on a liberal slant in this one regard, highlighting areas of mutual dependence and vulnerability as motivation for cooperation. Thus China's "free-riding" is not an issue to be framed as an unfortunate byproduct of the US pursuing its own independent energy security.

One obvious reason why we don't immediately see this as strongly liberalist energy security approach is because China remains a non-OECD member and thus also not a member of the International Energy Agency, the main institution in global energy governance. The institutional partnerships developing at this stage between the United States and China are still early and minimal and largely at the bilateral level or are delegated as side projects within larger

non-energy related multilateral institutions.[123] Thus at this stage it would be premature to depart from the realist approach entirely, particularly as the linking of military force with securing energy supplies implies the desire to deny resources to an adversary (say, Iran) remains a primary driver of policy. The main tenets of the Carter Doctrine remain realist in this way.

But viewing the concept of energy security from a world economy integration lens holds immense potential, as liberal energy scholars have argued.[124] While applying a state lens to energy security would emphasize the US presence as constituting a hegemonic presence, and thus the US/China relationship in the Persian Gulf as suboptimal for the US, when viewed from a global economic interdependence angle, energy security becomes a site of cooperation. In the very same report projecting future US energy independence, IEA's *World Outlook 2012* additionally cautioned, "no country is an energy island."[125] Rather, changing realities in the global energy realm have meant "policy makers looking for simultaneous progress towards energy security, economic and environmental objectives are facing increasingly complex – and sometimes contradictory – choices."[126] Thus, in pursuit of the United States' "national interest" also comes the promotion of China's national interests. The potential for energy security to serve as a site of cooperation in global affairs has recently drawn attention in policy circles, one notable example being US Sentor Joe Lieberman's speech to the Council of Foreign Affairs comparing energy policy and energy security's potential for inspiring cooperative behavior in international relations to that of US-Soviet arms control negotiations in the 20th century.[127]

This chapter has sought to demonstrate that continued US engagement in the Persian Gulf following the recent changes in US energy supply patterns still appears to be taking shape under the historic umbrella of the Carter Doctrine. This is contingent on an expanded conceptual

[123]Christoffersen, Gaye. "US-China Energy Relations and Energy Institution Building n the Asia-Pacific." *Journal of Contemporary China* 19, no. 67 (2010): 871-889.
[124] Keohane, Robert, and David Victor. "The Transnational Politics of Energy." (*Daedalus* 1 (2013)) p97-109.
[125]"World Energy Outlook 2012." International Energy Agency. www.iea.org/publications/freepublications/publication/English.pdf (accessed May 31, 2013). 2.
[126]"World Energy Outlook 2012." International Energy Agency. www.iea.org/publications/freepublications/publication/English.pdf (accessed May 31, 2013). 2.
[127] Speed, C. P., and Roland Dannreuther. *China, oil and global politics*. New York: Routledge, 2011. 104.

frame that tweaks the definition of the concept of an "ally" to include China, reflecting a liberalist bend emerging in a traditionally realist approach to energy security. The Carter Doctrine has historically been a realist doctrine in that it was implemented on the premise of denying the energy resources of the Persian Gulf to a non-ally, the Soviet Union, and again in the case of the Gulf War from Saddam Hussein's Iraq. Following these eras, increasing economic interdependence has been the defining global trend of the post-Cold War order. The changed global strategic context and resulting changes in state behavior thus do not invalidate the Carter Doctrine as the driver of US military engagement in the Persian Gulf, but rather prompt an adaptation of its conceptual links to realist definitions of energy security.

CONCLUSION

The work put forth in this study has investigated what factors are predominantly motivating current US policy in the Persian Gulf, specifically via the US-Saudi "special relationship," if not traditional realist approaches to energy security that have historically done so under the Carter Doctrine. The investigation of this puzzle stemmed from an apparent discrepancy between the current reality of the Persian Gulf energy profile and the circumstances, which have traditionally justified a heavy US military presence in the region. That is, changes in supply patterns that now see the majority of Gulf oil shipped to East Asian markets combined with a lessened US dependence on Gulf oil presented an initial conceptual puzzle to relist definitions of energy security given the China factor—specifically, a heavy US military presence to secure the region's oil reserves for the United States and its allies.

To achieve its task, this study zeroed in on the case of US-Saudi relations as a site of analysis for gauging changes in US Gulf policy more broadly. The so-called "special relationship" was selected for several reasons. Following an overview of the history of US-Saudi relations, it was made evident that due to Saudi Arabia's historic status as the world's most important oil producer, the sheer scale of commitment required from the US to sustain the relationship (military protection, largest arms deals in US history), as well as some notable security trade-offs in continuing to support the Saudi monarchy (providing more fodder for al Qaeda), the case of the US-Saudi relationship would serve as the ideal go-to barometer by which to measure any significant changes in US Gulf policy. Within the case study, three variables were examined as potentially explaining the lack of any perceptible shift in US engagement in the Gulf in terms of its military commitments: US counter-terrorism strategy, promoting regional stability vis-à-vis Iran, and energy security itself.

While it was determined that post-9/11 counter-terror operations and concern over curbing Iran's nuclear program make the region of prime strategic importance, a close look at the situation suggests that US military engagement in the Gulf is still informed by the Carter

Doctrine, which ranks energy security considerations as paramount. This is due to the fact that the changes in the energy picture in the Gulf have not brought the essence of the Carter Doctrine up for full reappraisal, as the United States remains critical dependent on Gulf oil in its import portfolio and vulnerable to market disruptions. Thus, the United States' Gulf policy is still primarily motivated by energy concerns. Instead, where the puzzle manifested itself was in how the case of current US engagement in the Persian Gulf indicates an expansion of US energy security policy beyond traditional realist approaches that indicate some liberal refinements. Shared vulnerabilities stemming form global economic integration and a tight oil market have necessitated an expansion of the US's "vital interests" to include upholding Gulf oil supplies to China, commonly considered a geopolitical rival of the United States'. A re-reading of the Carter Doctrine in light of these trends indicates a liberal approach to energy security is refining traditional realist ones in US Gulf policy.

As previously stated, however, there are significant limitations to drawing implications from this study. The most obvious constraint is that a relatively small window of time that has passed (seven years) since changes in the United States supply patterns and domestic production began reducing US over-reliance on Saudi petroleum. Thus, this main contribution of this thesis lies in its presentation of a testable hypothesis for a future case study, such as one that measures perceptible shifts in US energy security policy if current patterns in the global energy landscape persist. The potential would then exist for the further refinement of energy security as a concept within the IR theoretical framework, particularly if significant institution building steps were to be taken between the United States and China over energy policy.

What is clear at this stage is that due to technological advancements and reduced consumption patterns, developments in the United States are "redefining the global energy map."[128] The consequences of an increasingly energy-independent United States can already been seen in US energy security policy, as this study has demonstrated through the case of US

[128] *World energy outlook, 2012*. Paris: OECD/IEA, 2012. 74.

engagement in the Persian Gulf. Though it is impossible to predict the future, traces of the ripple effects of these shifts in global affairs are likely to manifest themselves first and most obviously in the US-China relationship. Whether or not matters of energy security will serve as a mechanism for developing a cooperative relationship between the two powers[129] will likely be a key focal point in global affairs over the next several decades.

[129] Speed, C. P., and Roland Dannreuther. *China, oil and global politics*. New York: Routledge, 2011. 104.

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