SHOULD WE STAY OR SHOULD WE GO
THE SHALE REVOLUTION AND AMERICAN INVOLVEMENT IN THE MIDDLE EAST

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I. INTRODUCTION

Testifying before the Senate Foreign Relations Committee in 2006, Secretary of State Condoleezza Rice once railed against the United States' addiction to foreign oil: "We have to do something about the energy problem. I can tell you that nothing has really taken me aback more… than the way that the politics of energy is… 'warping' diplomacy around the world."[1] Such statements are nothing new. Indeed, every president since Richard Nixon has labeled America's overreliance on foreign oil as a strategic liability and promised to put America on the path towards energy independence. Unfortunately, the history of presidential energy security policy is riddled with failure. Despite several presidential initiatives, American imports of crude oil rose steadily from 1.93 billion barrels in 1970 to a peak of 3.69 billion in 2005.[2] A 2011 CBS News story summarized the trend with the damning headline: "Fuelish Dreams: Every President Tries to Break U.S. Oil Addiction; Every President Fails."[3]

Today, however, the headlines read differently. The United States is in the midst of a "Shale Revolution" in which domestic sources of shale oil and natural gas are rapidly transforming the nation's energy outlook. Soaring U.S. shale oil and gas production is sharply curbing U.S.'s net energy exports to the point that America will be a net energy exporter by 2050. Suddenly, the U.S.'s energy security seems to be on rather sound footing.

While the Shale Revolution has already begun to reshape the energy landscape, its geopolitical consequences are still unclear. A key area of interest is determining what impact the Shale Revolution will have on the United States' strategy and military posture in the Persian Gulf, an area produces 30 percent of the world's crude oil.[4] Indeed, as Barry Posen notes, the United States has long protected the flow of oil in the Persian Gulf with "a full panoply of air, sea, and land forces, a goal that consumes at least 15 percent of the U.S. defense budget."[5] To some supporters like Admiral Dennis Blair and General Michael Hagee, the Shale Revolution provides the United States the strategic flexibility to significantly reshape and reduce its footprint in the Middle East.[6]

This paper examines that broad proposition with a critical lens. Our research question is simple: How will the Shale Revolution affect U.S. strategy towards the Middle East, specifically in the Persian Gulf? We first examine whether increased production from the Shale Revolution will continue and arrive at the conclusion that it will endure. Next, we review the history of U.S. involvement in the Middle East since 1971, a story of threats and responses that gradually deepened U.S. commitments in the region. This history reveals a multiplicity of interests that motivates U.S. engagement. Next, we turn to a comparative study that draws lessons from Britain's experiences with energy revolutions. Our comparative study of the British experience demonstrates that hegemonic powers retain a broad array of interests that are worth securing with global forces. We show that Britain acted as a balancing power in the Middle East and secured oil resources to hedge against the rise of a regional rival. We contend the United States must do the same today.

Our study of the past points to a clear policy recommendation: continued engagement in the Middle East. For a public that wants to disengage from the region, this proposal may be unsatisfying.

Though the Shale Revolution promises an era of domestic energy abundance, it will not upend U.S. strategic interests in the Middle East. Both its energy and its non-energy interests will endure well into the future. Moreover, U.S. allies will continue to depend on Persian Gulf oil supplies, and the United States has an interest in their economic well-being. Lastly, related interests such as preventing the rise of a hostile hegemon like China, protecting regional partners like Saudi Arabia, and countering unconventional threats like terrorism will persist in the Middle East even if the United States becomes a net energy exporter.

II. WHAT IS THE SHALE REVOLUTION? – A NEW AGE OF ENERGY ABUNDANCE

> *[I]t now looks as though the first few decades of the twenty-first century will see an extension of the trend that has persisted for the past few millennia: the availability of plentiful energy at ever-lower cost and with greater efficiency, enabling major advances in global economic growth.*[7]
>
> — Edward Morse, Citigroup commodity research director

Only five years ago, the United States confronted what seemed to be a depressing future dominated by peaking global oil supplies, falling conventional production, and rising imports of foreign oil and natural gas.[8] The U.S.'s energy outlook was grim. However, those predictions proved to be "spectacularly wrong."[9] The United States is now in the midst of a "Shale Revolution" in which domestic sources of shale oil and natural gas promise decades of energy abundance. Instead of peak oil production, analysts now forecast increasing rates of global production.[10] U.S. oil and natural gas production has skyrocketed since 2009, and the nation's imports of foreign oil are rapidly decreasing. As of 2014, the United States imported 44 percent of crude oil from other countries. Of the 44 percent imported, 25 percent came from the Persian Gulf.[11] However, analysts now expect the United States to surpass Saudi Arabia as the world's largest oil producer by 2015 and become a net oil exporter by 2030.[12]

The Shale Revolution represents a massive shift in the U.S. energy outlook. Two factors catalyzed the revolution. First, new drilling techniques including hydraulic fracturing (or "fracking") and horizontal drilling allow American companies to extract natural gas and "tight" crude oil from shale rock formations across the country. Until recently, extracting these unconventional energy resources was not considered economically viable.[13] New drilling techniques made recovery of those reserves feasible. Recent estimates now put the quantity of technically recoverable North American shale gas at 1,930 tcf—roughly fifty times greater than estimates in 2003.[14] Proven U.S. crude oil reserves increased for the "fifth year in a row in 2013, and exceeded 36 billion barrels for the first time since 1975."[15] Tight oil discoveries in North Dakota and Texas accounted for 90 percent of that increase.[16]

The combination of high oil prices and falling operational costs created a favorable environment for unconventional drilling. With oil prices hovering above $100 per barrel for much of the past decade, energy companies were willing to make large up-front investments in shale drilling technology. The prospect of high profit margins, supported by relatively high crude oil and gas prices, drew thousands of drillers into the industry. Thus, while improvements in drilling techniques made production of shale gas technologically feasible, underlying economic conditions made the United States' Shale Revolution possible.

1. Will the Shale Revolution Continue?

The Shale Revolution has produced dramatic gains in domestic production of oil and natural gas. However, skeptics caution that these gains might be short-lived. In particular, they point to two potential pitfalls: declining production rates and unfavorable drilling economics. We argue that each of these concerns is overblown.

Skeptics like David Hughes, a geologist and president of Global Sustainability Research, point out that fracking yields uneven production because wells deplete quickly.[17] While the rate of depletion for conventional oil wells averages around 5 percent per year, some shale oil wells deplete at a much faster rate—44 percent per year, for example, in the Bakken shale plays of North Dakota.[18] Higher well depletion rates could indicate that production gains are illusory. Just because a shale well spurts out a significant supply of oil today does not mean it will continue to do so in the near future. Recent technological innovations, however, are changing this pattern. New seismic technologies have enabled drillers to find and tap wells with slower depletion rates and long tails of production. According to veteran oil analyst Ed Morse, there are now a sufficient number of these wells to ensure that the flows will continue over time.[19] At the very least, these high-quality wells virtually eliminate the possibility of a sudden plunge in shale oil and gas production.

Skeptics also assert that falling global oil prices could upend many shale companies that operate on razor-thin margins. *The Economist* notes that most major companies "assume an oil price of $80 when making plans."[20] Bernstein Research concurs, but also notes that a third of U.S. shale oil production is uneconomical at that price.[21]The recent plunge in oil prices, which bottomed out at $44 in January 2015, has already had this effect.[22] Industry analysts at Baker Hughes note that the number of U.S. oil rigs dropped 24 percent from the all-time high in October 2014.[23] This, the skeptics contend, presages a drop in U.S. shale oil production.[24]

A drop in oil prices may pinch producers, but it does not spell the end of the Shale Revolution. Traders already expect the price of oil to rise again. Indeed, December 2017 Brent crude futures were trading above $73 in early February.[25] Moreover, a study by energy consultancy IHS, Inc. found that 47 percent of new U.S. oil producers could break even at a price below $61 per barrel. Technological innovation and better management practices will only drive this price lower through efficiency gains. A recent report by Accenture found that drillers could cut costs up to 40 percent through better planning, contracting, and purchasing.[26] The Energy Information Agency (EIA) reports that the quantity of shale gas produced per rig has increased more than 300 percent over the past four years due to technological innovations.[27] Morse points out that these efficiency gains are already having an impact; he expects them to drive break-even points to $40 per barrel within a few years.[28] In a sense, the same technological innovation that sparked the Shale Revolution helps ensure its enduring strength.

2. Does the Shale Revolution Shift U.S. Interests?

Our brief examination of the Shale Revolution indicates that it will dramatically alter the United States' energy outlook. Can we expect a similar shift in geopolitics, particularly U.S. involvement in the Middle East? There are *prima facie* reasons to expect so. A United States that no longer relies on Persian Gulf oil would theoretically have the flexibility to withdraw from a region that has consumed American blood and treasure for much of the last decade. In the following sections, we interrogate this claim and pose a question of our own: how will the Shale Revolution affect U.S. strategy in the Middle East? Studying the history of U.S. strategy in the area offers a worthy point of departure. Thus, we seek to understand, firstly, the key interests that have historically driven U.S. engagement and, secondly, whether the need to secure U.S. access to oil has ever been the sole or overriding interest justifying American strategy in the region.

III. A HISTORICAL REVIEW OF U.S. INVOLVEMENT IN THE MIDDLE EAST

"No Blood for Oil!"—anti-war protesters have employed this slogan since at least 1991, when college students used it to support their opposition to the Gulf War.[29] Rutgers professor Toby C. Jones wrote in a 2012 article about a U.S. "obsession" with oil that has motivated its "militarism" in the oil-rich Arab states. "Having crafted a set of relationships with oil and unstable oil producers and having linked the fate of those relationships to American national security," Jones asserts, "virtually ensures that while the United States is wrapping up the most recent oil war, its military and political strategists are already preparing for the next one."[30] Critics in academia, like Dr. Michael Klare in his article "Oil Wars Transforming the American Military into a Global Oil-Protection Service," and the general public have long been skeptical of the motives for American involvement in the Middle East. [31] For example, some charged that the American military was being deployed solely to protect the nation's oil supply.[32] Unfortunately for slogan-chanters, the situation is much more complex.

A history of U.S. policy in the Middle East since the 1970s shows that the United States has long expressed and defended a multitude of interests in the region. Secure access to oil for the United States, its allies, and the global economy has been a consistent priority, but far from the only motive for involvement. The enduring principles of U.S. Middle

East strategy also include:

1) Prevent the rise of a hostile regional hegemon: Since the 1970s, the United States has increased its presence in the Middle East to counter the threat of another dominant force that could cut off oil supplies to the Western world. From the 1970s to the end of the Cold War, the Soviet Union posed the dominant challenge. Iran and Iraq have similarly threatened to greatly expand their influence at times.
2) Support allies and partners in the Persian Gulf: The United States fundamentally values its allies' security, adding Kuwait and Saudi Arabia to a list of partners. Supporting U.S. allies boosts credibility, thereby enhancing America's role as a hegemonic guarantor of stability.
3) Maintain a stabilizing presence in the region: The prosperity of the United States and its allies depends on uninterrupted trade in an increasingly interdependent world economy. Instability in the Middle East threatens the global economy.
4) Counter unconventional threats: These threats include rogue states, terrorism, and weapons of mass destruction. They primarily arose after the collapse of the Soviet Union, and concerns intensified after September 11, 2001.

1. A History of Threats and Responses

Before 1971, the West enjoyed negotiating power with regional producers and could weather Middle Eastern oil-supply disruptions. Post-World War II Britain remained influential with the Gulf States and guaranteed the security of the small emirates. Yet three factors make 1971 a turning point in the history of U.S. involvement in the Middle East and a useful starting point for a "modern" history of U.S. goals in the region. First, the United States lost its twenty-year oil surplus capacity. The domestic combination of surging demand and falling discovery rates pushed U.S. companies to "all-out production" of its few producing wells.[33] This change meant the end of the "security margin" of production that had insulated the West from disruptions and crises in the Middle East.[34] Second, in February 1971, Western oil companies surrendered power to OPEC. The Tehran Agreement ended the fifty-fifty division of oil revenue that had been a "hallowed" principle for two decades; producer countries now had the upper hand in dividing revenues and setting prices. As Shell's chairman said at the time, "the buyer's market for oil is over."[35] Third, a regional power vacuum opened. Following through on Britain's 1968 renunciation of its security commitments east of Suez, British forces withdrew from the region in November. Renowned energy historian Daniel Yergin writes that the withdrawal "marked the most fundamental change in the Gulf since World War II and meant the end of the security system that had operated in the area for over a century."[36] The Soviets reacted quickly and filled the void, sending a naval task force to the Indian Ocean and negotiating for permanent bases on the Gulf as one part of the nation's long search for warm-water ports.[37]

After 1971, the United States faced a new era of economic and military volatility in the Middle East. Rather than sending U.S. forces to replace the British, President Richard M. Nixon relied on the pro-Western Iranian Shah to keep order in the Middle East. Exhausted by Vietnam, the United States delegated security to regional "policemen" under the Nixon Doctrine.[38] The history of U.S. involvement since then has been a story of threats and responses: threats to vital strategic interests and U.S. responses that deepened U.S. military involvement.

2. The Yom Kippur War and the OPEC Embargo

The first major threat to U.S. interests came in 1973 with the surprise Yom Kippur offensive against Israel. The United States' response showed that its commitment to an ally mattered more than its access to oil. Before the Arab states invaded the Israeli-occupied Suez Peninsula, "U.S. oil companies in the region [had] pressed the administration to adopt a less pro-Israeli position." President Nixon refused, standing by the official policy of support for Israel.[39] When the Israelis appeared vulnerable to defeat at the hands of the Soviet-supplied Arabs, the U.S. military resupplied their ally, but was unable to keep the effort secret. Arab oil producers led OPEC to impose a total oil embargo within the week.[40] By supporting Israel at the expense of the United States' oil supply, Nixon showed that oil was among several interests guiding U.S. foreign policy in the Middle East.

U.S. leaders responded to the economic threat of the embargo with limited measures. Nixon's first reaction was domestic: a speech that encouraged oil conservation and grandiosely announced Project Independence, an effort "in the spirit of Apollo [and] with the determination of the Manhattan Project."[41] In 1974, the United States formed the International

Energy Agency (IEA) with other importing nations, which led to the U.S. Strategic Petroleum Reserve and similar reserves in other IEA countries.[42] When Gerald Ford became president, he also focused on domestic measures: fuel standards, the massive Trans-Alaska Pipeline, and a plan for 200 nuclear power plants. These responses showed that although the United States worried about energy security, the country would not take aggressive military action to restore Middle Eastern oil supplies or the low prices it enjoyed before 1971.

3. The Origins of U.S. Central Command

In the 1970s, the United States arbitrarily divided the Gulf between European and Pacific Commands. Soon after President Jimmy Carter took office, National Security Adviser Zbigniew Brzezinski ordered a broad interagency review of "how we are doing in the world versus the Soviet Union." The review proposed a Rapid Deployment Force (RDF) for the Gulf. In August 1977, Carter created the RDF by presidential directive.[43]

As Brzezinski's military assistant Gen. William E. Odom later wrote, the impetus for the RDF was not securing oil supplies, but rather countering growing Soviet military power that threatened the region.[44] A March 1979 Brzezinski memo to Carter emphasized that Soviet power in the Middle East was concerning because Europe and Japan depended heavily on its oil. Yet, actual implementation had barely progressed by December 1979 when the Soviets invaded Afghanistan. Even after that, inter-service rivalry stymied progress.[45] U.S. Central Command (USCENTCOM) was finally established in January 1983. Odom's account shows that increased military focus on the Middle East was not driven solely or even primarily by U.S. demand for oil. Soviet aggression, regional instability, and allies' oil interests were the major concerns.

4. Double Trouble: Iran and Afghanistan

In 1979, the United States faced threats in both Afghanistan and Iran. Until then, U.S. strategists relied on Nixon's "Two Pillars" strategy of regional policemen that relied on Iran and Saudi Arabia for stability in the post-British power vacuum.[46] The Iranian Revolution that year ended the strategy's viability, and the Soviet invasion of Afghanistan worried U.S. policymakers. U.S. leaders feared that, "the Soviets hoped to capitalize on the American-Iranian crisis to secure a warm-water port on the Indian Ocean and to gain control of Arabian Gulf oil resources."[47] Americans perceived the invasion of Afghanistan to be more threatening than previous Soviet interventions. "[H]aving demonstrated its willingness to directly employ combat troops outside the Soviet Union and Warsaw Pact, as opposed to its normal practice of providing military aid, advisers, and logistical support," one political scientist writes, U.S. policymakers thought, "Moscow would next turn its focus to the Persian Gulf."[48] The concern was two-fold. First, the Soviets seemed to be embarking on a program of aggressive expansion. Second, this expansion might endanger Western access to oil, devastating import-reliant allies.

While Carter's rhetorical response was strong, it was neither politically popular nor militarily feasible. In his 1980 State of the Union, he declared, "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. It will be repelled by the use of any means necessary, including military force."[49] The Carter Doctrine was an election-year attempt to demonstrate U.S. strength to both the Soviets and the electorate. However, the doctrine was unpopular with allies and militarily unrealistic without forces like CENTCOM and the Fifth Fleet. In January 1980, the U.S. military lacked the ability to launch a major war in the area. According to Dr. Jeffery Michaels of King's College London, "not only did the U.S. military not have hundreds of thousands of troops available to be rapidly deployed to the region, it also did not have the means of getting them there or the means of sustaining such a force once it arrived."[50] Although the Carter Doctrine may have appeared to deter further Soviet aggression, evidence from Soviet archives shows that the Politburo actually invaded Afghanistan with *defensive* intentions; Moscow had no plans to invade the Gulf.[51] However untenable it was, the doctrine does reveal U.S. goals in the region. Rather than simply protecting the oil supply, Carter aimed to contain Soviet expansion and prevent a hostile hegemon from dominating the Gulf. These were two grand strategic goals beyond the flow of oil.

5. Balancing During the Reagan Administration

Mere months after his inauguration, President

Reagan issued a corollary to the Carter Doctrine that clearly identified U.S. strategy: "There is no way… that we could stand by and see [Saudi Arabia] taken over by anyone that would shut off the oil." Now, the United States had committed itself to not only repel an invasion by a foreign power—namely the Soviet Union—but also intra-regional threats.[52] While Reagan's corollary explicitly guaranteed the oil supply, the reasons for that guarantee are not explained as simply by the United States' thirst for Middle Eastern oil. As Blackwill and O'Sullivan make clear, our allies' economies depend more on that oil than the U.S. economy does.[53] In addition, guaranteeing the flow of oil is part of the job description for the global hegemon; as the British ensured freedom of the seas, the Americans need to ensure freedom of supplies.

Reagan made the corollary more realistic than Carter's doctrine by formally consolidating CENTCOM. However, one contemporary critic, Dr. Coral Bell, charged that he largely stood by during the Iran-Iraq War despite threats to oil tankers from missiles and mines. Likely unaware of ongoing covert efforts, the critic wrote in 1984, "Present U.S. policy looks uncommonly like a tacit acquiescence in the Nixon Doctrine—that local powers must learn to fend for themselves."[54] Though the United States appeared to passively stand by, the Reagan administration covertly used the Iran-Iraq War by "seeking to create a balance of military power between these two large Gulf powers in order to prolong the war, weaken them, and prevent an anti-Western local actor from dominating the region."[55] (Those efforts to supply both sides became public, and notorious, during the Iran-Contra investigation.) The effort to play the two powers against each other represents an instance of the U.S. grand strategic pillar of halting the rise of a hostile local hegemon. Reagan also expanded covert aid to the Afghan *mujahideen* that Carter had initiated.[56] U.S. leaders were taking some action to support their rhetoric, covertly expanding U.S. military involvement in the region.

The United States intervened in the Iran-Iraq conflict from 1987 to 1988 in an episode known as the Tanker War. Iraq began attacking Iranian oil production and shipping; according to a U.S. Navy historian, "Iraq hoped to weaken Iran's economy by reducing its oil-export capacity… and bring[ing] Iran to the negotiating table."[57] When Saddam Hussein accelerated the attacks on refineries and tankers in 1984, Iran retaliated against merchant ships that were buying oil from Iraq. Tanker insurance rates skyrocketed, and the conflict threatened to paralyze oil transport. (It is important to note that the United States itself only imported 10 percent of its oil from the Gulf, while Europe and Japan relied on the region for 30 percent and 60 percent of their respective supplies.) Here, allies' interests influenced U.S. action.

Kuwait sought U.S. permission to "reflag" its tankers, sailing under U.S. flags. Reagan agreed because he feared the Kuwaitis might otherwise turn to the Soviets, who could then win support in the region. U.S. naval forces cleared mines, escorted tankers, and occasionally engaged in skirmishes with Iranian ships.[58] The Tanker War illustrates the intertwined nature of U.S. interests: allies' energy security, a "Hamiltonian" demand for freedom of the seas, and preventing Soviet expansion.

6. The Persian Gulf War

When Saddam Hussein's Iraq invaded Kuwait in 1990, President George H.W. Bush refused an adviser's suggestion that he "get used to a Kuwait-less world."[59] Allowing Hussein to violate Kuwaiti sovereignty would undermine the grand strategy of maintaining stability and countering aggression. It also threatened energy security, since Iraq would have unacceptable price-setting power if it also controlled Kuwaiti production. Thus, President Bush assembled an international coalition to evict Iraq from Kuwait. The United States acted as a sole superpower countering the rise of an aggressive local power in accordance with its hegemonic responsibilities. Yet again, oil was connected to but distinct from other interests that deepened U.S. involvement.

Bush's speech to Congress on September 11, 1990 identified the multiple U.S. interests threatened by Saddam's invasion: countering aggression, energy security, and strategic credibility. The primary reason, supported by the U.N. and a wide coalition, was to counter aggression; this relates to the broader strategic goal of preventing a hostile regional hegemon. "Vital economic interests are at risk as well," Bush said, acknowledging motives beyond simply countering aggression. Bush also stated, "We cannot permit a resource so vital to be dominated by one so ruthless." Finally, the President said it was important that "no one doubt American credbility."[60]

Before the Gulf War, the U.S. military in the area had largely stayed "over the horizon" to maintain a low profile in these countries through utilizing offshore on aircraft carriers or at distant bases.[61] After 1991, U.S. involvement increased dramatically, especially in comparison with sharp reductions in Europe and Asia. Kuwait and Saudi Arabia accepted the U.S. security guarantee and hosted permanent U.S. bases. As deployments in Europe shrank drastically and those in Asia diminished somewhat, the Middle East was the only region with a growing U.S. military presence (see chart).[62]

In 1995, the Navy reestablished the Fifth Fleet to create a centralized command over naval forces around the Gulf. Along with new bases and forward positioning in the region, the United States maintained the no-fly zone in Iraq, acting as a regional policeman.[63] After the Gulf War, the United States made deeper commitments to protect allies and friends in the region. Though oil lies at the root of relationships with Gulf allies, U.S. credibility illustrates the importance of protecting allies beyond energy security. As with Britain in prior centuries, the United States found that its "unipolar moment" as the sole superpower brought great responsibilities.

7. The 21st Century: Old Interests, New Threats

After the Gulf War, the United States once again turned its attention to energy resources. A massive energy shortage in California accompanied by price spikes drew election-year attention in 2000. Once in office, President George W. Bush delegated the energy concern issue to Vice President Dick Cheney, a former energy industry executive. The Cheney Task Force identified a central policy problem: a "fundamental imbalance between supply and demand." It recommended new drilling, natural gas pipelines, and hundreds of new power plants, both conventional and nuclear.[68]

President Bush stressed the importance of increasing domestic production and reducing consumption. "If we fail to act," he warned, "our country will become more reliant on crude oil, putting our national energy security into the hands of foreign nations, some of whom do not share our interests."[69] After the September 11, 2001 attacks, Bush tied energy security to the global war on terror. In his 2007 State of the Union, he said U.S. reliance on foreign oil made the nation, "vulnerable to hostile regimes, and to terrorists who could cause huge disruptions of oil shipments, and raise the price of oil, and do great harm to our economy."[70] Military leadership agreed that energy security was critical.[71] Political leaders and policy experts alike predicted the imminence of "peak oil": a maximum global oil output followed by decreasing production, shortages, recessions, and conflict. In 2005, an energy analyst writing for *The Guardian* told the public to "kiss your lifestyle goodbye."[72]

While the September 11, 2001 terrorist attacks pushed the Bush administration to make terrorism its primary concern in the Middle East, the younger Bush was not the first president to focus on non-state actors in the region. In 1983, Reagan faced two Islamic Jihad attacks in Lebanon. Two years later, Hezbollah held hostage a passenger plane. In 1986, Reagan launched a

This table shows the multiplicity of interests identified in official U.S. strategy documents. U.S. access to oil is always acknowledged, but it has never been the sole motivator.

YEAR	DOCUMENT	STATEMENT OF INTERESTS
1987	National Security Strategy (NSS)	"[M]aintaining regional stability, containing and reducing Soviet influence, preserving the security of Israel and our other friends in the area, retaining access to oil on reasonable terms for ourselves and our allies, and curbing state-sponsored terrorism."[64]
1989	National Security Directive (NSD-26)	"Access to Persian Gulf oil and the security of key friendly states in the area are vital to U.S. national security. The United States remains committed to defend its vital interests in the region… against the Soviet Union or any other regional power with interests inimical to our own."[65]
1991	National Security Strategy (NSS)	"[P]romoting stability and the security of our friends, maintaining a free flow of oil, curbing the proliferation of weapons of mass destruction and ballistic missiles, discouraging destabilizing conventional arms sales, countering terrorism and encouraging a peace process [consistent] with our enduring commitment to Israel's security."[66]
1992	Draft Defense Planning Guidance for FY 1994-99	"[O]ur overall objective is to remain the predominant outside power in the region and preserve U.S. and Western access to the region's oil. We also seek to deter further aggression in the region, foster regional stability, protect U.S. nationals and property, and safeguard our access to international air and seaways. As demonstrated by Iraq's invasion of Kuwait, it remains fundamentally important to prevent a hegemon or alignment of powers from dominating the region."[67]

retaliatory strike against Libya for a Berlin nightclub bombing. The first attack on U.S. soil came with al-Qaeda's 1993 attempted bombing of the World Trade Center, followed by the 1996 Khobar Towers attack in Saudi Arabia. Clinton responded to the 1998 U.S. embassy bombings with cruise missile strikes on al-Qaeda in Afghanistan. Then, just days before the 2000 election, al-Qaeda bombed the U.S.S. *Cole*.[73] Islamic terrorism has been a persistent threat across administrations, with frequent but minor responses. The response to September 11, 2001 was exponentially larger: the invasion of Afghanistan. U.S. focus on counterterrorism in the Middle East dates to the 1980s, but September 11, 2001 elevated this goal to the core of strategy for the region.

U.S. military presence in the Middle East reached an unprecedented level when the United States invaded Iraq in 2003. The administration justified leading the nation to war by describing Saddam Hussein as a dictator who seemed to pose a serious threat and had previously invaded Kuwait. Hussein's history of weapons of mass destruction (WMD) production and use appeared to jeopardize regional stability. The justification behind the invasion of Iraq touted the need to ensure stability in the region, preemptively prevent WMD proliferation, and promote democracy. The multiple rationales for the invasion reflect the multiplicity of U.S. interests in the region.

8. The Choice Today

As the wars in Afghanistan and Iraq wound down, most U.S. troops were withdrawn. In contrast to the 201,414 deployed troops in the Middle East in 2003, as of late 2013, the United States only had 35,000 air, ground, and naval personnel there.[74] The United States now faces a decision: what is the future of U.S. presence in the Middle East? The United States can learn from Great Britain's example when it, too, had to choose between retrenchment and engagement.

IV. COMPARATIVE STUDY: BRITISH POLICY IN THE MIDDLE EAST 1900-1920

> *I do not care under what system we keep the oil, but I am quite clear it is all-important for us that this oil should be available.*[75]
>
> — British Foreign Secretary Arthur Balfour, August 1918

As a global hegemon with far-flung economic interests and broad defensive commitments, the early twentieth century British Empire faced many of the same challenges that the United States confronts today. Strategically, Britain hoped to prevent the rise of a rival that could challenge its hegemony. Britain found it necessary to adjust its grand strategy to energy revolutions during the early twentieth century. British policies in the Middle East during this period show that Britain often asserted control over oil interests in the region to prevent other powers from gaining valuable resources and strategic areas at Britain's expense. Whitehall's promotion of British companies in the region and the renegotiation of the 1916 Sykes-Picot Agreement to secure better terms matches our argument that the United States must remain in the Middle East to prevent the dominance of oil resources by other nations.

The comparison of Britain and the United States rests on the belief that thwarting the rise of a rival hegemonic power in the twenty-first century has been a basic principle of American grand strategy since the fall of the Soviet Union.[76] Because early twentieth-century Britain similarly sought to thwart the ascent of France, Germany, and Russia, the comparison is particularly apt. During the early twentieth century, the British government repeatedly asserted its power in the Middle East through diplomacy, military action, and collaboration with oil companies. The desire to deny resources and strategic positioning to other great powers often motivated British moves. While oil became more important during World War I, British actions throughout that period showed that a hegemonic power must commit itself to vital regions and secure oil reserves to block the rise of a rival hegemon. The United States today confronts a similar situation as Britain did in the period surrounding World War I.

Throughout the second half of the nineteenth century, Britain and Russia engaged in the "Great Game" for control of Persia and the modern-day Middle East. Russia's desire for warm water ports and the British need to protect trade routes to India drove the competition. Oil added another dimension to the Great Game. British collaboration with oil interests began in earnest when the Foreign Office supported William Knox D'Arcy's efforts to purchase an oil concession in Persia in 1901. Whitehall saw a

British oil company in Persia as a means of asserting British influence while separating a weak Persia from Russia.[77] Persian oil grew still more important when First Lord of the Admiralty Winston Churchill shifted Britain's battleships from coal to oil fueling in 1913. Accordingly, Churchill persuaded Parliament to purchase for the Admiralty a majority stake in the fledgling Anglo-Persian Oil Company, founded by D'Arcy.[78] With the financial and diplomatic support of the British state, the Anglo-Persian Oil Company grew into the corporation that is today BP.

In parallel to Persia, the British government sought an oil concession in the Mesopotamian region of the Ottoman Empire, although no company had yet drilled for oil there. Britain was initially drawn to Mesopotamia to protect its approaches to India and maintain the balance of power. In this period, Germany was negotiating the construction of the Baghdad Railway, and the German concession included mineral rights. Britain thus saw the attempts of D'Arcy and others to win another oil concession in Mesopotamia as strong projections of British interests.[79] Companies' holdings allowed Britain to compete with other powers in a region where it had heretofore lacked a strong presence. In 1914, the British and German governments negotiated the combination of their various holdings in the Ottoman Empire under the Turkish Petroleum Company.[80] The willingness to collaborate with rival Germany in an international corporation shows that Britain was motivated by the pragmatic need for a foothold in a region under heavy German influence, rather than an ideological craving for territorial control. In the current post-colonial age, such flexible tactics are all the more applicable to the United States and its presence in the Middle East.

The mechanized warfare of World War I demonstrated the importance of oil reserves. Between 1915 and 1917, the Admiralty's consumption of oil increased from 80,500 tons to 190,000 tons. The number of trucks in the newly mechanized army grew from one hundred to 60,000 by the war's end. Explosives required the chemical toluol, which was derived from crude oil.[81] Before the oil shortages of 1917, the British had granted France postwar control over the Mosul region in Mesopotamia, then considered likely to be oil-rich, in the 1916 Sykes-Picot Agreement. The Foreign Office's hope to satiate Russian and French demands for power in the region led it to ignore the Admiralty's recommendation to retain Mosul. The result was that the Sykes-Picot Agreement was unfavorable in oil terms, as it surrendered Mosul and its surrounding reserves to France.[82]

As in Persia, access to oil and the denial of French dominance became more important than formal territorial control of the region. In August 1918, Secretary to the War Cabinet Maurice Hankey led the government to reconsider its strategic interests and renegotiate the Sykes-Picot Agreement to gain access to Mesopotamian reserves.[83] The wartime oil shortage and subsequent Bolshevik Revolution, which removed the need for a buffer between the Middle East and Russia, altered the strategic calculus.[84] After the armistice with the Ottoman Empire, the British army seized Mosul by force to improve Whitehall's negotiating position.[85] Despite repeated breaks in high-level negotiations, in 1920, British and French officials finalized the San Remo Agreement, under which Britain won Mosul and the Mesopotamian mandate in exchange for backing a French mandate in Syria. France would receive 25 percent of British Mesopotamian oil and pipeline rights.[86]

Studying British strategy in the Middle East demonstrates the importance of global balance of power dynamics in resource-rich regions. Like Britain, the United States is a global hegemon and large-scale oil consumer that could face competition from a rival power with increasing energy demands, most likely China. However, the United States could improve on the British precedent by avoiding unfavorable treaties like Sykes-Picot and taking a tougher stance akin to the position Britain adopted to achieve the more advantageous San Remo Agreement. Just as the British presence in the Middle East fulfilled the dual goals of securing energy resources and thwarting the rise of a rival, so too would keeping American forces in the Middle East increase leverage over potential rivals. As we will discuss later in this paper, China's growing demand for oil and its investments in the Middle East render it the most threatening rival in the region. Distant powers like France threatened British hegemony in the Middle East in the early twentieth century, and the United States accordingly cannot discount the Chinese threat to the far-flung Middle East, especially in today's more globalized world. Great powers seek the resources they need, and those areas become the locations of strategic competition.

British strategy in both the pre-war and post-war periods gave Britain leverage in the diplomacy of resource allocation in the Middle East. In neither case did Britain hoard Middle Eastern resources through territorial annexation. Rather, Britain sought to increase its sway over rival powers. Through the Turkish Petroleum Company, Britain gained a foothold in a region of burgeoning German influence that could have proved valuable in tempering German power had World War I not broken out. Likewise, Britain did not seek to entirely exclude France when renegotiating the Sykes-Picot Agreement. Under the San Remo Agreement, France retained pipeline rights and control of twenty-five percent of oil. Yet, Britain held the leverage to cut off France's oil flows and affect the regional supply through its dominant presence. As we discuss at length in our proposal section, the United States should ensure that it remains the strongest outside power in the Middle East.

The case of Britain shows that remaining the hegemonic power in a region does not necessarily require a massive force presence or the complete exclusion of other powers. While the mandate system for the Middle East was partly a response to emerging Wilsonian ideals of self-determination, it also suited the British interest in steering the course of events in the Middle East without costly annexation. Britain used its influence to reach an agreement with France that guaranteed the British supply of oil and prevented France or any other country from becoming too powerful in the region. The United States can draw lessons from the British experience in leveraging economic power and force presence to prevent rivals from threatening Middle Eastern oil resources. To apply British Prime Minister Harold Macmillan's famous historical analogy, the British case should serve as the "Greek" example for our present day "Rome."

V. OUR PROPOSAL

In spite of the Shale Revolution, the United States retains three key interests in a continued presence in the Persian Gulf. In order to advance these goals, America requires a continued military presence in the region. In his book, *The Next Decade*, George Friedman lists three primary reasons for U.S.-involvement in the Middle East: "to maintain the regional balance of power; to make certain that the flow of oil is not interrupted; and to defeat Islamist groups centered there that threaten the United States."[87] Friedman illustrates that a multitude of interests, not just oil, keep the United States involved in the Persian Gulf. These interests require action. As Kenneth Pollack and Ray Takeyh write, "Ignoring the region's problems will not make them go away."[88]

We argue that the presence of America's Fifth Fleet and current troop levels in the region are necessary, especially in Saudi Arabia, Bahrain, and Qatar. Then, we examine the three priorities Friedman illustrates—the global nature of the energy market, our Asian and Middle Eastern allies, and the need to prevent another power's dominance—to demonstrate why America's presence will be necessary even after the Shale Revolution.

Strategic Force Posture

What would an ongoing strategic presence in the Middle East look like? As we have shown, there is a strong need for a U.S. military presence in the Middle East. Our previous historical review demonstrates that the United States maintained a sizable presence prior to the invasion of Afghanistan in 2001. During the wars in Iraq and Afghanistan, U.S. forces increased dramatically in the region, even outside the direct combat area. We argue that the U.S. should maintain the current U.S. posture in the Gulf, including the newly established bases and continued operations of the Fifth Fleet.

Maintaining the Fifth Fleet presence is crucial for ensuring access to the global oil market. The United States and its allies rely on access to oil through the Persian Gulf.[90] By patrolling the Persian Gulf, the Fifth Fleet allows the United States to ensure open seas and global commerce. Twenty percent of all oil traded worldwide passes through the Straits of Hormuz. [91] Oil trade through these straits includes twenty-seven countries and 7.5 million square miles, in addition to choke points such as the Suez Canal and the Bab al-Madeb in Yemen.[92] If another power such as Iran or China were to be able to gain control of these waters, it could upset the global energy supply and extract concessions from U.S. allies.[93]

The U.S. Naval Forces Central Command, which oversees the Fifth Fleet, advances "the interests of the United States and the security and prosperity of the region" according to their mission statement.[94] Through its mission of promoting security and

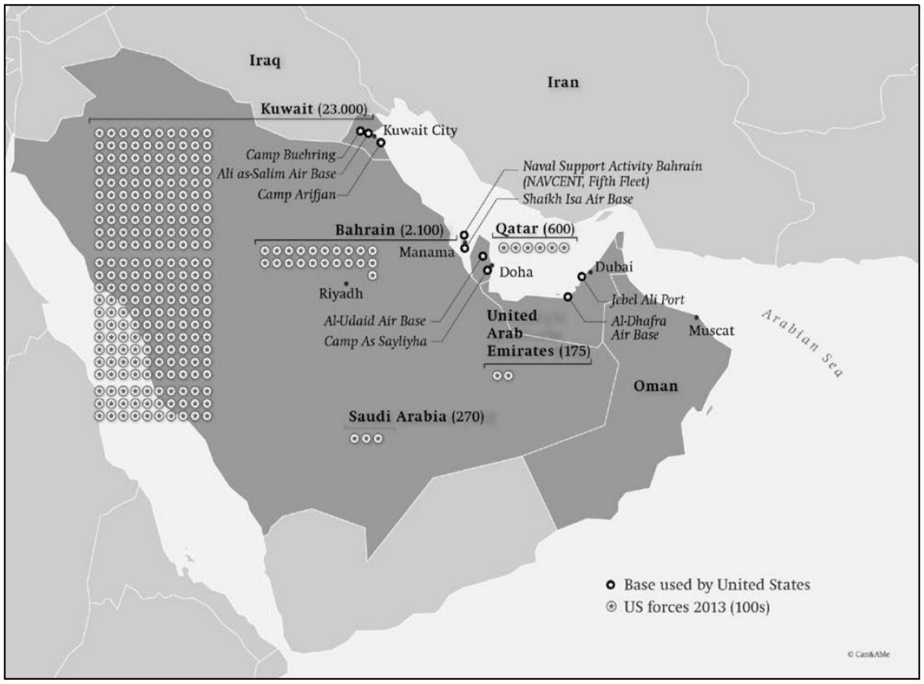

Figure 1: U.S. Force Posture in Persian Gulf, 2013[89]

prosperity across these major shipping lanes, the Fifth Fleet acts as both a deterrent and protective force. In order to achieve its goals and protect U.S. and Allied interests, the Fifth Fleet requires a sizable presence of 7,179 military personnel stationed at Naval Support Activity Bahrain, seven naval bases, and two aircraft carriers that operate on a rotational basis.[95] While minor adjustments could be made in coming years, a large naval force is necessary to protect U.S. strategic interests in the region.

Besides a strong naval presence, the United States must also maintain robust air and ground capabilities in order to support peace and stability in the region and prevent the rise of another power. Air bases give the United States an organized, forward-deployed presence, allowing it to secure the Gulf. For example, U.S. Central Command Headquarters at Al Udeid represents the strategic foundation of the United States military force in the Middle East and provides "mission-essential combat power, aeromedical evacuation and intelligence support for three theaters of operations."[96] Al Udeid fields crucial capabilities with over ninety different types of aircraft, including the KC-10 Extenders and KC-135 Stratotankers.[97] These two aircraft extend the reach of fighters and bombers, allowing the United States to project its power throughout the region.[98] Maintaining the Al Udeid Airbase and U.S. air presence deters would-be rivals.

Reductions in troop levels would put these strategic goals at risk. The long-range aerial refueling and transport capabilities of the aircraft stationed at Al Udeid airbase, not to mention its use as a command base, make for a robust military relationship with Qatar and other Gulf partners of the United States. In December 2013, former Secretary of Defense Chuck Hagel noted that there are more than 10,000 forward-deployed soldiers in the Gulf area.[99] We argue that the Shale Revolution does not change the rationale behind keeping 10,000 troops and the Fifth Fleet stationed in the Gulf region. These bases, ships, and troops are required due to the global nature of energy markets, our allies' interests, and the need to deter a potential competitor.

1. The Global Nature of Energy Markets

The global and interconnected nature of energy markets requires the United States to reexamine its goal of energy independence and recognize its larger interests in the Middle East. Because of interconnected nature of the global energy market, the United States will have a lasting interest in the stability of the Gulf States and their oil reserves. Though the Shale Revolution has reduced U.S. imports of Middle Eastern oil, it does not eliminate the need to support valuable regional partners. If it continues, the decrease in oil prices brought about by the Shale Revolution will pose a serious threat to the fiscal health of the Gulf states and their leaders' ability to purchase popular legitimacy. While the United States may welcome long-term pressures for democratic reform, the strain may cause instability that threatens Gulf regimes over the next ten years—and by extension, the stability of the global oil markets they supply. An enduring and credible U.S. military presence would hedge against this dangerous prospect.

Despite the rhetoric over attaining complete "energy independence," the United States will continued to be subject to global prices as both an importer and potential exporter. As J. Robinson West and Raad Alkadiri write, "[C]rude oil is a global, price fungible commodity… [so] the U.S. economy will remain vulnerable to any events there [the Middle East] that disrupt supplies from the region."[100] Even if the United States had more fuel than it could consume, it still would be connected to the Middle East under the global pricing system.[101] Oil is a globally traded commodity; therefore, the price of oil is dependent on global supply and demand, not on local supply and demand. Moreover, the United States will continue to import specific grades of oil, even if the United States becomes a net oil exporter, because refineries are built specifically for certain grades of crude oil.[102] Finally, U.S. supply is still significantly less than future demand. "Bullish" estimates predict fifteen million barrels per day of U.S. liquefied oil production by 2020. By comparison, the United States consumed approximately nineteen million barrels of oil-based liquefied fuels per day in 2009.[103] While the Shale Revolution may reduce U.S. dependence on Middle Eastern supplies, it will not entirely eliminate the influence of Middle Eastern oil.

The Shale Revolution seems unlikely to radically upend the major oil-producing states in the Gulf in the immediate future. GCC states still produce a quarter of the world's oil. Although the United States has been importing less OPEC oil, global demand remains robust. As recently as July 2014, OPEC anticipated "needing to raise its production to meet demand for [its] oil."[104] Indeed, until the sliding prices of recent months, which analysts attribute more to falling Asian economic growth than U.S. unconventional production, oil prices remained relatively high compared to historical levels at prices between ninety dollars and 120 dollars (nominal) per barrel from 2009-2013.[105] A Center for Strategic and International Studies (CSIS) report expects Asian demand for oil, though temporarily faltering, to recover.[106] CSIS concludes that the Shale Revolution is "unlikely to transform the Gulf directly" or pose major geopolitical or economic threats to the region's largest producers.[107]

Yet, the Shale Revolution's downward pressure on oil and gas prices pose two daunting challenges to Gulf stability. The first is diminished OPEC influence. Since 1971, the cartel's Gulf producers have wielded control of global oil markets and commanded prices that sit well above production costs. The Shale Revolution puts OPEC's long-term future in jeopardy, especially if increased supplies decrease prices.[108] This event, Blackwill and O'Sullivan argue, would severely test OPEC cohesion. Individual producers would likely refuse to curb production and scramble for the largest piece of a shrinking pie. Citigroup oil analyst Ed Morse agrees, and predicts that the Shale Revolution will lead to the "prevalence of market forces in international energy pricing, putting an end to OPEC's forty-year dominance."[109]

Falling prices could produce budget shortfalls in Arab states. Already, oil prices have fallen below the break-even points necessary for Bahrain, Oman, and Saudi Arabia to balance their budgets.[110] Oil revenues are important to Gulf stability because of the domestic and military programs they fund. Leaders in Kuwait, Bahrain, and Saudi Arabia use oil revenues to provide citizens with expensive cradle-to-grave welfare systems and energy subsidies.[111] These "gifts" are designed to pacify citizens and insulate autocratic regimes from popular discontent.[112] In 2014, Bahrain spent a whopping 12.5 percent of GDP on energy subsidies alone.[113] Kuwait subsidized domestic energy at the cost of seventeen billion dollars, or roughly 25 percent of all government spending.[114] Kuwaiti consumers enjoy one of the lowest gas prices in the world: ninety-one cents per gallon.[115] Pressures for expanded subsidy programs have grown ever since the onset of the Arab Spring. For example, in 2011, former Saudi King Abdullah unveiled a domestic benefits package worth $130 billion. Rising domestic expenditures have pushed Saudi Arabia's oil price budgetary break-even point up from over seventy-eight dollars in 2011 to ninety-eight dollars in 2014. Iran requires prices above 131 dollars, up from eighty-four dollars just three years ago.

At least for the moment, most of the Gulf States have sufficient reserves to weather a temporary fall in oil prices. Saudi Arabia, for example, has sufficient foreign reserves to self-finance decades of deficits. It sat on 737 billion dollars in reserves as of August 2014 (almost three times current annual spending).[116] However, if the Shale Revolution and concurrent developments keep prices within the seventy to ninety dollars range over the next decade or two, as Morse predicts it will, countries with high break-even points and smaller cash reserves may face serious trouble.[117]

Any decision to cut domestic spending, whether out of necessity or inclination, could invite domestic backlash or provoke unrest. However, previous periods of suppressed oil revenues suggest that major spending cuts are unlikely. In the 1980s and 1990s, Qatar, the U.A.E., and Saudi Arabia all covered their fiscal needs by taking on large debts rather than making politically sensitive cuts.[118] Middle East analyst Carol Barnett expects that they would pursue the same measures, although doing so would not eliminate the possibility of turmoil. In fact, a continued focus on subsidies could hamstring these regimes' ability to make investments that are necessary to diversify their economies and spur future economic growth.[119] If Gulf nations fail to provide meaningful employment to their young, growing populations, expanded subsidy packages alone will not alone be able to mitigate unrest from domestic unemployment. The possibility that festering internal conflicts in countries like Bahrain and Saudi Arabia could boil over in the face of rising unemployment rates, low oil prices, and sectarian divides could "pose a danger to the stability of Saudi Arabia and thus to the United States." [120]

2. Fueling American Allies

An ongoing U.S. presence in the Middle East is critical to U.S. allies in Europe, Asia, and the Middle East itself. Critics such as political scientist Barry Posen argue that protecting allies' access to energy is not the United States' responsibility, encourages free riding, and constitutes a "moral hazard."[121] Nonetheless, U.S. forces must remain in order to preserve the world order that the United States enjoys as a superpower.

a. Asian Allies' Interests in the Middle East

The perceived choice between pursuing the Asia Pivot and remaining in the Middle East ignores the fact that the United States' Asian allies have crucial energy interests in the Middle East and rely upon the U.S. to protect such interests. In 2012, 97 percent of oil exports from the U.A.E. went to Asia. The Saudis exported 54 percent of their oil to Asia. Indeed, with 85 percent of the oil shipped through the Straits of Hormuz destined for Asia in 2014, East Asian countries have an overwhelming interest in the stability in the Middle East.[122] Asia's reliance on Middle Eastern energy requires the protection of the sea lanes by the Fifth Fleet to maintain reliable trade.

For an in-depth example, oil accounted for 45 percent of Japan's total primary energy supplies in 2011. In 2012, 83 percent of Japan's crude oil came from the Middle East.[123] Japan's use of oil and gas is only going to grow as its nuclear power capabilities decline due to the Fukushima nuclear accident of March 2011. In a National Bureau of Asian Research special report, Tsutomu Toichi argues that, if the United States retrenched, Japan would need to provide economic and humanitarian assistance to the Middle East in order to stabilize its source of oil. Japan is dependent on free navigation of the high seas to transport these energy supplies.[124] Japan would suffer if instability or an aggressive China interrupted oil production or transportation.

The South Korean economy also requires Middle Eastern oil. Roughly 80 percent of Korean crude oil imports originated in the Middle East in 2010, with 70 percent of the imports a part of long-term contracts.[125] Amidst concerns about the stability of the Middle East, Korea has sought to diversify its energy sources by offering a tax rebate for fuel sold from non-Middle East areas. Korea also began receiving oil imports from Alaska in October 2014, signed a free-trade agreement with Canada, and reached out to Russia about the possibility of a natural gas arrangement. [126] However, these policies have not drastically curtailed Korean dependence on the Middle East oil. According to U.S. Naval War College Professor Terence Roehrig et al., "[a]ny political and economic turmoil from the Middle East may endanger a stable energy supply."[127] South Korean companies have built oil refineries and energy infrastructure throughout the Middle East.[128] Desperate for a secure energy supply, South Korea relies on the U.S. presence in the Middle East.

b. European Allies – The Qatar Connection

The effects of the U.S. Shale Revolution resonate throughout energy markets across the globe. The Shale Revolution presents new opportunities to open energy supplies to our allies in Europe. These allies have traditionally relied upon regional sources of natural gas and oil, especially Russia. New sources of natural gas exports from nations in the Middle

East provide an opportunity for Europe to diversify its energy supply. However, this change will only be possible if the United States continues to ensure a stable Middle East.

Qatar has been a major player in the increased liquefied natural gas (LNG) shipments to Europe.[129] LNG exports from Qatar to Europe are estimated to increase by 33 percent in 2014, which would boost the natural gas supply in Europe by 6.64 million metric tons.[130] Qatar's significant LNG export capacity has "undercut the price of oil-indexed gas from Russia and Norway and brought new liquidity to northern European gas markets."[131] These new supplies account for the increase in the amount of natural gas in Europe traded on the spot market from 15 percent in 2008 to over 50 percent in 2014.[132] The increase in supply from Qatari LNG imports decreases the spot price of natural gas in the short term. Over the long term, this development provides an opportunity for Europe to reduce its energy reliance on Russia and improve its bargaining position with state-owned monopoly Gazprom.

These European imports are only available as a result of the Shale Revolution in the United States and the continued ability of Qatar to safely export LNG. The explosive growth of domestic natural gas production from shale reserves in the United States has greatly reduced our demand for natural gas imports from abroad. In 2005, the U.S. Energy Information Administration (EIA) forecasted that the United States would import 29 percent of its natural gas in 2013, or about 9.4 billion cubic feet per day. As a result of the Shale Revolution, actual imports in 2013 accounted for only 5 percent of domestic consumption.[133] This difference means that most of the 9.4 billion cubic feet per day of imports the United States would otherwise have purchased from foreign suppliers is now available to other consumers, including European countries. A stable Middle East is a prerequisite to these supplies reaching the international market.

In keeping with its close relationship with the United States, Qatar has joined other countries in calling for a U.S. force presence in the region. Osman Antwi-Boateng, assistant professor of political science at U.A.E. University, explains that the Qatari government enjoys greater military capabilities and influence as a result of its relationship with the United States.[134] Given an especially weak Qatari military, the Arab nation relies on its relationship with the United States for its protection.[135] For the reasons listed above, that security is vital to European natural gas supplies.

As with Qatar, the United States enjoys strong military relationships with its other Arab partners, including Saudi Arabia, Oman, Bahrain, and Kuwait.[136] During the Gulf War, these ties were built on the Arab consensus that "a dominant and strong country in the region is necessary in order to prevent regional instability and crisis."[137] A relationship with the U.S. military allows Arab countries to secure themselves against their regional rival, Iran. The security relationship between the United States and its Arab partners therefore remains a crucial factor both in the region and in opening alternate sources of fuel for European allies.

3. Preventing Another Power from Dominating the Middle East

These alternative sources of fuel would be threatened if a rival power came to dominate the oil supplies. The threat of another hegemon dominating Middle Eastern oil supplies and the necessity of balancing against that rival is the subject of great debate. While those in favor of retrenchment argue that there is no great power in the Middle East, they neglect to consider China's interests. China will likely import three quarters of its oil from the Middle East by 2030.[138] In its current force posture, the United States protects China's oil supply. The Fifth Fleet monitors the Persian Gulf, and the United States promotes regional stability through measures such as airstrikes against the Islamic State and the Levant (ISIL).[139] China has attempted to offset its reliance on Middle Eastern oil and U.S. protection of the Persian Gulf by importing natural gas from Russia, exploring the South China Sea, investing in Africa, and strengthening ties with Iran. However, China consumes 10.28 million barrels per day, second only to the United States as of 2012.[140] China's robust appetite for oil suggests that it may seek more control in the Middle East, especially if the United States were to retrench.

China has a strategic interest in securing Middle Eastern oil, but it also will likely expand its role in the Middle East in the absence of United States protection of the region.[141] "Securing" the area would not necessarily entail a large military presence, but could involve increased economic control and diplomatic influence. China views the Middle East as being "integral to Asia's power politics." [142] It has already increased its presence internationally in the energy domain as it focuses on "ownership" and "physical controls of barrels along with future access." Such measures are part of China's "go-out strategy," according to the National Bureau of Asian Research Energy Security Program's Research Director Michael Herberg.[143] With Xi Jinping increasing China's international role, the country is poised to deepen its relations with the Middle East and seek "physical controls." Saudi Prince Alwaleed bin Talal has observed that, "China is very eager to fill any vacuum that the United States may create."[144]

Chinese actions have reinforced the validity this reasoning. In 2013, it was China, not the United States, which gained most from the Iraqi oil boom. China funded airports near Iraq's border with Iran to ferry Chinese workers to and from Iraqi oil fields.[145]Although China has not joined in strikes against ISIL, Chinese strategic interests indicate that it may expand its involvement in the region in the absence of U.S. forces. If China becomes an influential power in the Middle East, the United States would face a great power challenge worthy of a regional presence. It would be ironic if the United States succeeded in limiting China's influence in Asia with the Asia Pivot, but failed to contain China's growing role in the Middle East.

Even if China expands its presence in the Middle East in order to secure its energy interests, why should the United States care? First, in its current posture, the United States maintains considerable leverage over China and other great powers. China currently lacks a large enough blue water navy to secure the major sea lanes in the Persian Gulf.[146] By controlling China's access to part of the energy market, the United States gains strategic leverage. Beijing believes the United States may be maintaining control of major shipping lanes in order to "exploit China's energy weakness."[147] While that is not the main reason for U.S. control of shipping lanes, it does strengthen the United States vis-à-vis China.

Chinese involvement could upset the regional balance. In conjunction with considerations about low oil prices destabilizing OPEC countries, a Chinese economic presence would further escalate conflict. Harvard Weatherhead Center fellow Colonel Christopher Sage warns that a "localized arms race could develop as the U.S. and China flood weaponry, both seaborne and otherwise, into the region. Such a scenario, combined with mistrust and miscalculation, could spark a conflict no one desires."[148] Sage's prediction gains legitimacy with an examination of the historical precedent of China's role in the Darfur Crisis. In 2007, Sudan accounted for 6 percent of China's oil imports while China accounted for 40 percent of Sudan's oil exports.[149] From 2003 to 2006, China sold the Sudanese government fifty-five million dollars of small arms in addition to aircraft and large weaponry.[150] Human rights groups and news outlets blamed China for backing the Sudanese government and fueling the crisis in the interest of oil.[151] In the case of Sudan, China showed a willingness to escalate regional conflicts in order to protect its oil interests. Similar involvement in a volatile Middle East would further harm the region and destabilize U.S. allies.

Burden-sharing with China in the Middle East is not necessarily problematic. In fact, Chatham House scholar John V. Mitchell and others support burden sharing.[152] Our comparative case showed that great powers can negotiate power-sharing deals, as Britain did with Germany and France. However, a rapid decline in the United States' presence in the Middle East could cause long-term strategic conflict between the United States and China that would destabilize the region, and perhaps the world. Arguments against a continued presence in the Middle East suggest there is no possible great power in the region. In contrast, a U.S. drawdown from the region has the potential to increase Chinese involvement. As our case study shows, when energy supplies are at stake, great powers are likely to seek regional control. In order to mitigate possible competition in the Middle East and promote peace and stability, the United States should avoid retrenchment and retain a strategic presence in the region.

VI. CONCLUSION

The Shale Revolution should not encourage the United States to withdraw from the Middle East. A review of U.S. foreign policy in the Middle East since the 1970s shows that the United States has historically held broad strategic interests in the region. Those strategic interests will endure beyond specific crises and require a long-term U.S.

commitment. In comparison, Britain's policies in the Middle East resonate with the need for the United States to remain in the region, lest a rival attempt to assert control.

Maintaining an active U.S. troop presence through the air, land, and sea bases in Gulf-ally nations will be necessary for the United States to pursue its four traditional goals: promote a regional balance of power, stabilize global energy markets, protect allies' energy supplies, and deter potential rivals. The dominance of the U.S. Fifth Fleet in the Persian Gulf checks the rise of a challenge for regional hegemony, while U.S. bases in the region shore up the security concerns for Gulf partner states in combating threats like terrorism and WMD proliferation. In a world of interconnected energy markets in which the United States' European and Asian allies continue to rely on the Middle East for energy imports, the United States cannot afford to abandon the region.

The U.S. Shale Revolution undoubtedly changes the way the United States looks at its energy needs. Nonetheless, the United States cannot afford to risk its strategic priorities in the Middle East. When faced with the question of whether to go or to stay in the Middle East, the United States must not pull back in retreat, but instead accept its continuing role as the world's sole superpower.

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