
Caspian Riches and Gulf Security

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At the time of the breakup of the Soviet Union in December 1991, international experts predicted that its demise would spawn a wave of democratization as well as a series of bloody ethnic conflicts across former Soviet lands. Few predicted, however, that the retreat of Soviet power would spark a heated struggle for oil and gas reserves in the Caspian sea region by global oil corporations and their home governments. The dissolution of the Soviet Union widened the northern tier of the Middle East region as a series of developments led to the emergence of new ties between the newly independent states and the traditional Middle East.

The Caspian basin's entry into the picture is the most important change, and the region was soon branded the "New Middle East." During the Cold War arbitrary delimitations and territorial conceptualizations dominated most strategic thinking. For example, the Caucasus, Eastern Anatolia and the Gulf were evaluated as different territories and regions. The end of the Cold War changed logical patterns for conceiving of these regions, and studies began to focus on the historical and geopolitical contingencies uniting these geographic entities.¹ In fact, the political and cognitive geography of the Middle East, together with its constituent subregional zones like the Gulf, is much wider than its physical geography. Under the guidance of this new understanding, this study analyzes the

impact of the Caspian's riches on Gulf security within the context of the enlarged Middle East.

The sudden disappearance of the bipolar composition of world politics led, according to some analysts, to the primacy of "the regional" in shaping and understanding security patterns of international politics.² However, the opening of the Caspian Sea's riches into the strategic rivalry, and its spatial proximity to the central arena of the world's energy resources—namely the Persian Gulf—challenges this kind of a regional turn in security thinking. This also challenges and blurs our traditional conceptions of region, which treats geographically defined delimitation as absolute ontological categories, rather than epistemological attributions. In fact, the parameters of security in that geopolitical expanse constituted by the Caspian and the Gulf cannot be identified depending exclusively on separate regional considerations.

The concept of a "security complex" proposed by Buzan seems appropriate in analyzing the international politics of the enlarged Middle East.³ However, given the post-Cold War metamorphoses, this term becomes confining in face of a far broader geopolitical space emerging among the Caucasus, Central Asia, Anatolia and the Middle East. "Security complex" refers more to strategic maneuvering, under the realist insight, to security relations defined in perceptive terms, rather than to the substantial dynamics and much wider implications of a geopolitical space. This point can be more clearly made when we compare the Gulf region defined as a security complex with the Middle East defined as a broader geopolitical zone combining Central Asia, the Caucasus and Anatolia. To state this in more simple terms, if the Gulf is a security complex, then the Middle East as a regional system is something more than such a complex with its multifaceted, multigeographic nature. This new understanding makes it impossible to think of the Gulf region independently of the geopolitical concerns of the Caspian region, further complicating the jobs of decision makers interested in this region. The analyses regarding these regions should be conducted in view of this widened context.

The geo-economic ties that characterize the Middle East also prove the significance of grasping the Middle East as a geopolitical space. Most of the countries in the region, in particular the Gulf states, have economies that are fiscally dependent on the parameters of a transregional market—the international oil market. Any crisis related to oil in the region will eventually affect this global market, and vice versa. Consequently, the dynamic spatiality of the Middle Eastern regional system exceeds the physical limitations, and therefore considering the Middle East in these broader terms becomes inevitable when depicting a security framework for the region.

This kind of an analysis is also in line with the new security thinking that has expanded its definitional boundaries to encompass international economic

issues and ecological concerns, in addition to purely political and military ones. The classically state-centric approach of realism, and its emphasis on the zero-sum notion of security has been eroded by a multidimensional conception of security that emphasizes the security interdependence among different actors and in various issue areas.⁴ Accordingly, this study first discusses current security issues within the enlarged Middle East, and then relates them to the context of the Caspian's riches.

Gulf Security

Before discussing the main balances shaping Gulf security, it is necessary to consider the shifting nature of the framework of the Middle East and analyze Gulf security in this widened context. Recent discussions on Middle Eastern security involve a considerable amount of literature highlighting the emergence of a new Middle East. These discussions are inspired, to a certain extent at least, by Shimon Peres's use of the concept designating the region as a place where regional cooperation replaces political competition.⁵ In fact, the nature of post-Cold War international politics has transformed the nomenclature of the discipline along with its conceptual patterns and definitive notions—such as “region” and “frontier.” It is only normal that these transformations reflect upon a new conception of the Middle East.

However, interpretations differ when one attempts to describe the new characteristics of the region. Certain factors and processes have led to various optimistic forecasts for Middle Eastern security. The first and foremost development that implicates a new and more secure Middle East is the Arab-Israeli peace process. Depending upon the relative rapprochement between Israel and some of its opponents in the Arab world, some analysts foresee a peaceful future for the region. Considering the gradual internalization of Israel in the region, and its evolution from a cultural and then geopolitical alien to a recognized regional entity, prospects for a normalized, nonhostile strategic relationship seem possible. In fact, for a short period of time, the Madrid and Oslo summits reinforced this inclination towards optimism, though two situations make this assumption far from realistic. The first development was a negative shift in the peace process, especially with Netanyahu's coming into power, and the nonsupportive policies in relation to the peace process pursued during his government. The continuation of Israeli settlement policies and the delay of withdrawal from the West Bank have prevented peaceful expectations and turned the peace process into a “cold peace” that still continues to be a dominant state of affairs, despite the positive implications of Barak's election.

The other factor that makes optimistic prophesies for the peace process unrealistic is the fallacious adoption of the process itself as the central criterion

and the ultimate condition for the security of the Middle East. The “perceived centrality” of the peace process creates a false impression that the settlement of Arab-Israeli problems will result in the end of chronic insecurity in the region. Although the peaceful resolution of problems between Israel and Arab countries

Iran aims to increase its influence and prestige in the Caspian with regards to the United States and Turkey, while it has contributed little to the prosperity or security of the region.

is one of the most important factors in enhancing security, there are many other dynamics and strategic trends that constitute the principal characteristics of security in the

Middle East. Apart from serious issues coming out of sustained crises in the peace process, Middle East politics are characterized by a large number of territorial disputes, ethnic and religious clashes, intra-Arab problems, civil wars, and intense competition for resources such as oil and water. This suggests that the major variables defining the future of security in the region will continue to be formative even if the peace process ends with real success.

Another matter that should be taken into consideration is the overly militarized perception of security in the Middle Eastern states. In general, the countries of the Middle East can be classified into two categories: traditional kingdoms and military-bureaucratic autocracies. Given the highly militarized nature of these states, increased military buildup and the proliferation of weapons of mass destruction (WMD) are some of the most critical issues concerning the region.⁶ The strategic competition that characterizes Middle Eastern politics drives these countries to security planning largely based on the perception of military balances. Dependence on militaristic patterns of state behavior is the result of what can be called the “dictatorial mood” prevalent in these autocratic states. The confrontation potential between Israel and its Arab neighbors; strategic tension in the Caucasus and Central Asia with Turkey, Iran and Russia; and hegemonic attitudes and irredentist moves of countries like Iraq and Iran in the Gulf all pose serious threats to regional security and motivate high levels of militarization.

When we observe Iraqi and Iranian attitudes towards WMD acquisition and armament, we see similar trends. Both of these countries are labeled as rogue states, despite certain flexibility for Iran in international rhetoric, and lack any powerful outside support. They are the most marginalized countries by the hegemonic powers of the international system. Apart from this they both have a history of warfare extending to their civilian populations, particularly during the Iran-Iraq War. Their regional ambitions, Iraq’s hope for territorial gain, and Iran’s antiwestern revolutionary rhetoric and desires for preeminence in the Gulf pro-

vide sufficient reasons for harsh responses from regional and extraregional countries like the United States. Such responses come in two forms: either military intervention—the case of Iraq; or political-economic pressures—the case of Iran. In such a context, WMD acquisition and a substantial military capability are important means of preserving security for these two nations.

In Gulf Cooperation Council (GCC) states, there is also an upward trend in arms purchases. The perceptive lessons these states learned from the Gulf War egged on their pursuit of armament. In the face of an ambitious Iraq and a resurgent Iran, GCC states feel the need to enhance domestic defensive capabilities and follow high rates of arms purchases. This is also a way of burden-sharing with the United States and other allied powers in keeping post-Gulf War security in the region.⁷

In the post-Gulf War Middle East, militarization and WMD acquisition stayed at high rates in general. Even in the case of a relative decrease in arms purchase rates in the region or by a specific country, the nature of the arms, the motivational factors behind the will to purchase, and its perceived effects should be considered as important as the amount of military equipment being purchased. The downward trend in arms purchases does not necessarily decrease the severity of conflicts. As some analysts point out, the rise in the number of surface-to-surface ballistic missiles in the region is a sign of more severe results and increased casualties in possible military clashes.⁸ The character of military equipment and technology is, therefore, more indicative of security than is its number.

The post-Cold War conditions in international politics bear important implications about armament and proliferation trends. The fading of patron-client relations between Russia and its local proxies left such countries as Libya, Syria, Iraq and Algeria on their own in security matters. The need for a more powerful indigenous military force increased, making armament and WMD proliferation the most reliable way of improving domestic capabilities. Moreover, with the dawn of strategic alternatives to both the non-alignment movement and outright dependence on Soviet backing, WMD possession became the most preferable option to enhance the regional and international position of local countries. In the post-Cold War world, WMD capability seems to be the most influential vehicle for international prestige, assertiveness and attention. The search for strategic weight drives many countries to the fringes of WMD proliferation.⁹ Increased militarization and WMD proliferation will continue to be decisive in regional security, and some kind of a “catch-up” arms race will be constitutive in regional security projections.

Moreover, despite some collectively minded initiatives in the region, Middle Eastern countries lack a true commitment to institutionalized security arrangements. Two institutions are generally mentioned when collective security is thought of in the region; one is the Arab League and the other is the GCC. However,

neither of them can be regarded as a strictly indigenous institution designed specifically for security. First of all, they do not encompass the entire region and therefore could not manage to resolve any critical conflict. Most importantly, they are unable to create a firm basis of confidence in their members or to enhance their members' formal commitment to these institutions. The reluctance of regional actors to commit formally to common security institutions is easily observable. Although the GCC and the Arab League are important forums for discussions on security-related matters and grounds for security-related diplomacy, they cannot carry out decisive roles in conflict resolution. Informal security activities, rather than formal security relations, are on the rise in the region, especially in the form of joint strategic activity involving non-regional actors such as the United States.

Focusing more on the Iranian attitude, which is at the core of all potential conflicts in the Gulf region, there were speculations for a possible moderation in Iranian foreign policy after the election of Mohammed Khatami, particularly with regard to Middle Eastern states. Iranian Foreign Minister Kharazi said that one of the priorities of the new Iranian Government's policy was to establish closer cooperation, wider prospects and improved relations with Arab states.¹⁰ In return, the Arabs looked forward to the positive changes that Iran's new president, Mohammad Khatami, has promised in order to boost the country's ties with its Arab neighbors. Hamad Bin-Ali al-Sulayti, assistant secretary general of the Gulf Cooperation Council for political affairs, said the six constituent members of the council are looking forward to concrete confidence-building measures and to putting bilateral relations back on the right track. Muhammad Zakariya, assistant secretary general of the Arab League for political affairs, said Iran has acquired the credentials to be a friend and ally of the Arabs. He said that with the kind of Iranian president now in office, chances have improved for a solution to the dispute between Iran and the United Arab Emirates over the three islands of Tunb al Sughra, Tunb al Kubra, and Abu Musa.¹¹ Indeed, as some analysts point out, the changes in leadership typologies in both Iran and Saudi Arabia, together with weakening economic conditions, created a certain measure of rapprochement between the two countries that have serious implications for the global energy market and for the security composition in the region. According to Bahgat, this development should not be evaluated in zero-sum terms because it is not directed against a third party. On the contrary, this can help stabilize the global oil market and the region's security.¹²

Despite this positive atmosphere that reached its peak after Khatami's visit to Saudi Arabia, there are still difficult problems with which to be dealt. Gulf countries expect Tehran to act in the following manner in order to ease tensions with the Arabs and to put an end to the protracted crisis, which continues to contribute negatively to security in the Middle East:

- Reexamine and negotiate in a friendly manner the various issues of dispute. This includes opening the file on the seizure by force of the three United Arab Emirates islands in 1971. The two sides should rely on international arbitration if direct talks between them fail.
- Adhere to a policy of joint cooperation in fighting all forms of terrorism; forbid any terrorist elements to seek asylum in Iran or the Arab world; and extradite fugitives with criminal sentences to the proper country.
- Discard all slogans that undermine the sovereignty and security of Iran and the Arab countries, including the slogan “exporting the revolution.”
- Protect the security of the Arab League states. This is an indivisible task. All defensive measures must be taken to deter any external or internal aggression directed towards any Arab state in accordance with the letter and spirit of international and regional charters.¹³

As a final note, the future of Gulf security will be determined on the basis of Iran's capability and willingness to fulfill these demands. Western military presence in the Gulf has in fact led to a decline in Iran's strategic importance, a shrinking of its regional role, and a narrowing of the scope of its political and military activity in the region. Iran's opposition to the Middle East peace process is partly due to Iran's fear that an end to the Arab-Israeli conflict will lead to the outbreak of an Arab-Iranian conflict that will raise sensitive Arab-Iranian issues which have remained suspended; most importantly, the issue of the three islands in the Gulf.

The Impact of Caspian Riches on Gulf Security

The emergence of the Caspian region in international politics further complicated the geopolitical situation, adding new ties between the traditional Middle East and its northern tier. Issues like oil prices, pipeline politics, external intervention and regional conflicts have entered the scene. For example, the oil price from November 1997 to December 1999 continuously fell, reaching lows not seen since the first oil shock of 1973.¹⁴ The fall of oil prices has significantly diminished the importance of Caspian oil. These oil reserves appeared increasingly vulnerable with oil prices around \$10 per barrel—especially since there is a \$7 per barrel transport cost involved in moving Caspian oil to the Black Sea.

Many analysts argue that prices will remain low for several years if not longer. If accurate, such low prices could force changes in behavior that would affect private companies, national oil companies and markets in general. In the aftermath of the last great price collapse of 1986, this meant reducing project costs. An obvious solution for the producing governments, already underway before the current price crisis, is to allow foreign companies access to develop their reserves. The logic is that private sector companies will generate greater revenues

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more quickly and at lower prices. However, the estimations that prices would remain low were not true. As mentioned previously, in the 13 months before December 1999, average monthly crude oil prices declined 50 percent to \$9.31 per barrel. The subsequent nine months witnessed an astonishing 150 percent increase in price to \$15 per barrel.

Though estimates differ, the Caspian region is believed to contain proven oil reserves in the range of 30–40 billion barrels. Some analysts estimate that potential reserves could bring total reserves to over 200 billion barrels. In April of 1998, during heated debates concerning the construction of pipeline routes, the London-based International Institute for Strategic Studies (IISS) released a report questioning the estimated figures of oil deposits in the Caspian Sea region. The IISS experts argued that the 200 billion barrels projected by the United States Department of Energy were an exaggeration. They put forward that the Caspian region's oil deposits are between 25 and 35 billion barrels, which is comparable to North Sea oil reserves.¹⁵ It is no secret that this amount would represent a new source of non-OPEC oil production. This reserve may eventually become a threat to Gulf oil unless the region's countries adopt more market-oriented policies of economic investment. New prices and investment policies would be needed for the sake of protecting the Gulf's share from newcomers, whether from the Caspian Sea or any other source. One should also note that a series of complicated technical, economic, logistical, geopolitical and social obstacles are in the way of the rapid development of Caspian oil reserves. However, existence of reserves other than Gulf oil would mean a high price strategy might not be sustainable for Gulf producers.

Economists at the Organization for Economic Cooperation and Development prepared a study, which says proven oil reserves in the Caspian Basin amount to about 3 percent of total world resources. It also asserts that the region has about 7 percent of world reserves of natural gas. In their view, the Caspian region could bridge any resulting energy gap, if war or other kinds of turmoil interrupt Middle East supply.¹⁶

However, the real problem for Caspian and Gulf security lies elsewhere, and this might be clarified with reference to the political and economic experiences of the Middle East. The principal threat to the Gulf economies is still their heavy reliance on oil revenues at the threshold of a period, which, as specialists argue, will be characterized by low oil prices together with a prospective global oil surplus.¹⁷ The oil principalities—or as some call them, the “rental states”—in the Gulf depend mostly upon the generosity of oil resources. They have no solid industrial base or any real diversified production. Their domestic order is preserved by the social benefits inherent in the appropriation of money from high oil revenues. Continuously falling oil prices, then, are fatal for the Gulf states. It is the increasing possibility of growing internal instability in face of contracting oil

revenues, rather than external threats, that will be the real challenge to security in the region.

The patterns of development pursued by the Caspian states seem to follow an analogous line. The reliance on the prospective fruits of natural resources, rather than on socio-political reform and institution-building, recalls the historical experiences of the Middle Eastern countries, further confirming the fateful alignment of these two regions in strategic thinking. Most of the countries in the Middle East acquired their statehood following the colonial period, a fact evidenced by the artificial boundaries separating them. Their state-building experiences were driven largely by their oil-centered socio-economic structure. The recurring instabilities in the region stem from this over-dependence on oil revenues without a genuine industrial production base and from the lack of a firm legacy of state tradition. Similar processes might be experienced in the Caspian region, though in no worse conditions. The Caspian states emerged from the formal disintegration of the Soviet empire in a manner analogous to the end of colonial rule in the Middle East. In dealing with the state-building problems, the Caspian states are also oriented more toward the promises of natural riches than toward institutionalized reform. Given the diminishing returns of a volatile oil market and the declining oil prices predicted for the following decades, this kind of attitude and policy can easily result in chronic internal tensions within the Caspian states as well as in the

Gulf. Furthermore, neither these indigenous countries nor the United States, which is the prime security manager in the region, are prepared for these growing internal instabilities. In handling inter-state clashes in these regions

the United States proved itself well, but as the Iranian revolution in 1979 and the bloody conflicts in the Balkans—especially in Bosnia—indicate, U.S. initiative cannot resolve mature internal instabilities easily.¹⁸ In this sense, the Caspian's wealth in natural resources may turn into a self-destructive possession.

The transportation of the Caspian's riches to the global market is another heated issue. Since the beginning of the debate over carrying the reserves of the Caspian Basin reserves to world markets, the idea of transporting oil through Iran has been kept alive and found supporters from various parties to the debate.¹⁹ The main reasons for this are the relatively better shape of Iran's domestic pipeline and the country's proximity to Azerbaijan, Kazakhstan, and Turkmenistan, in addi-

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tion to its borders on the Caspian Sea. The Iranian pipeline option requires an extra 100 kilometers of pipeline with a cost of \$350 million. This route would connect the Azerbaijani side of Caspian oil fields along the coast to existing pipelines that lie southeast of Tabriz. No international oil companies have yet begun to talk of building transit pipelines from the Caspian through Iran to the Gulf. Taking this situation into consideration, Tehran seems willing to sign more swap agreements with the countries of the Caspian Sea region. Swaps offer an easy way both to supply northern Iran, which is far from the oil-rich southern region, and to increase Iran's leverage on world markets, even if the oil is sold on behalf of others. The latter has an important implication for the entire region, since Central Asian countries would then be dependent on Iranian markets and transport routes. Furthermore, this situation would increase Iran's position and influence in the Persian Gulf.

The projected development certainly would not be desirable for the United States and its allies in the region. This would worsen the current state of relations, namely the security dilemma, which may be defined in terms of the fact that most of the ways in which a country seeks to increase its security have the unintended or intended effect of decreasing the security of other nations. In geopolitical environments in which competition rather than cooperation is the rule of the day, countries are quick to attribute malevolent intentions upon their perceived adversaries, even if their adversaries' activities are ambiguous in nature. Moreover, under such conditions, all players are likely to view events in a zero-sum fashion in which a gain by one side is perceived by the other as a loss. Unfortunately, the Caspian region, as the northern part of the Middle East, is emerging as such an environment. Iranian activities are intentionally aimed to increase Tehran's influence and prestige in the region vis-à-vis the United States and Turkey, while in actuality Iran has contributed little to the prosperity or security of the Caspian region.

The American government perceives that it has been deeply engaged in the security of the Persian Gulf, which has been threatened by both Iran and Iraq in the last two decades. The dual containment strategy has been very costly to maintain over an extended period of time. The security dilemma that the White House faces in the region is very likely to increase as new players enter into the scene via the connection of Caspian oil. The prerequisite for security in the Persian Gulf is the commitment of the regional states to the sovereignty of the oil producing countries in the region. Therefore, if the Iranian objective of shipping Caspian oil to the Gulf is realized, then Russia and Iraq may engage in a new alignment to contain the increasing power of Iran in the region, which in turn would aggravate security considerations in the region between these rival nations. On the other hand, if the Turkish option of a pipeline through the Baku-Ceyhan line is overstressed, then Iran and Russia may be pushed closer together.²⁰

Eventually, however, the rising discontent with the policy of “dual containment” might likely change U.S. policy. This is due to the fact that, “in addition to being costly to the United States, these measures have caused friction with U.S. European allies, disputes with China and Russia, and deep concern among some of the Gulf states—all without successfully isolating Iran.”²¹ Some even argue that the American equation of Iran with Iraq under the dual containment logic may force these countries into a tactical alliance. Therefore, considering the reality of their being natural players in the region, Iran and Iraq should eventually be integrated into the security architecture of the Middle East.²² Thus it is most probable that there will be a gradual shift in the “dual containment” policy.

Apart from the “dual containment policy,” the U.S. overall presence in the Middle East is itself problematic. The burden and responsibilities of deep U.S. involvement in Gulf politics creates intense criticism. One author, criticizing the Clinton administration’s Middle East policies, states, “five years later, anti-American sentiment in the Arab world is on the rise, the peace process is in tatters, and attempts to isolate Iran and Iraq have backfired miserably.”²³ U.S. over-involvement in Middle East politics alienates indigenous populations, further exposing U.S. military bases to local aggression. It seems that, in the face of a growing political consciousness in the South, and a growing sensitivity with regard to casualties in the North, U.S. presence and involvement in the region will be increasingly troubled.²⁴

Conclusion

The new geopolitics of the Middle East drive major regional powers into new and more challenging policy formulations and strategic calculations, as is apparent in the Caspian pipeline debate. The connection of Caspian energy resources to world markets pose serious difficulties among the states involved in the matter. The addition of this issue to the other more historical ones creates a dynamic, but more threatened, Middle East.

The internal challenges resulting from stagnating oil prices, demographic growth, political instabilities, and ill-fated economies are grave issues for the region. Given all these features—the region’s vast oil but few water resources, unmet expectations of the so-called “rogue nations,” and regional and international ambitions regarding the Middle East—it will continue to be among the most dangerous areas of the globe.

After discussing the impact of Caspian riches on Gulf security within the context of the enlarged Middle East, powerful, institutionalized, and collective security cooperation seems to be an unlikely prospect, given the decades-long conflicts, the ill-defined borders, the territorial and demographic fluidity, and the lasting strategic competition for oil and water. Foreign policy analysts and policy-

makers should be aware that in the short term—even optimistically speaking—regional states will pursue defense and deterrence policies backed by shifting alliances. As Cohen argues “it is necessary to grasp the individual nature of these countries rather than viewing Central Asia as ‘part of the former Soviet Union,’ the ‘near abroad’ of Russia, or ‘part of the Muslim world.’”²⁵ This argument at first seems contradictory to our idea of a broad geopolitical zone combining the fate of the Gulf with the Caspian region. In reality however, since any decisive strategic move coming from a key player in Caspian affairs will generate in other powers a responsive act aimed at releveling the strategic balance, this fact furthers the security interdependence of the enlarged Middle East. ❁

Notes

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