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RSCAS No. 2004/33



The Internal and the External: The House of Saud's
Resilience Explained

Paul Aarts



EUROPEAN UNIVERSITY INSTITUTE

Robert Schuman Centre for Advanced Studies
Mediterranean Programme Series

EUI Working Paper RSCAS No. 2004/33

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EUROPEAN UNIVERSITY INSTITUTE, FLORENCE
ROBERT SCHUMAN CENTRE FOR ADVANCED STUDIES

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EUI Working Paper **RSCAS** No. 2004/33
BADIA FIESOLANA, SAN DOMENICO DI FIESOLE (FI)

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ISSN 1028-3625

© 2004 Paul Aarts

Printed in Italy in December 2004
European University Institute
Badia Fiesolana
I – 50016 San Domenico di Fiesole (FI)
Italy

<http://www.iue.it/RSCAS/Publications/>

Robert Schuman Centre for Advanced Studies

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Abstract

Trying to explain the resilience of the House of Saud, it is surprising that so much attention has been paid to internal factors at the cost of the international context. It's time to look outside the box. An almost exclusive focus on the internal environment—through modernization theory, political economic approaches (among which the 'rentier state' thesis, the 'fluid-class structure' approach, and most recently the '*asabiyya* capitalism' thesis), or using a 'political culture' perspective—cannot fully elucidate the longevity of the Saudi monarchy.

The House of Saud's survivability can only be understood after bringing into focus the international environment, in particular its relationship with the United States' government. Although relations have been deteriorating since '9/11', we are not heading for a divorce (though that has been widely predicted—and sometimes advocated, on both sides). There is still much that binds the two regimes: *the persistent logic of energy and security*. The Iraq war did not fundamentally change the picture and neither side seems able to locate a meaningful alternative to the other (although speculations abound). It is wishful thinking that post-Saddam Iraq will reduce the Saudi role in the world oil market and thus supplant the Saudi Kingdom in terms of US favour. Regime durability may be primarily attributable to *external* forces.

Keywords

Saudi Arabia, energy & security, regime durability, American-Saudi relations

‘We want you nervous. We want you to realize that now, for the fourth time in 100 years, this country and its allies are on the march, and that we are on the side of those whom you, the Mubaraks, the Saudi royal family, most fear. We are on the side of your own people.’

James Woolsey¹

I. Introduction²

After the attacks on the World Trade Center and the Pentagon in September 2001, it took the Saudi authorities a long time to acknowledge that fifteen of the nineteen terrorists were in possession of a Saudi passport. The Riyadh government only unveiled this fact in February 2002. As Adel al-Jubeir, the foreign advisor to Crown Prince Abdullah, summarily explained: ‘After September 11, we went through shock, then denial, and then introspection.’³ And as Abdulaziz Sager rightly observed, ‘The Bush administration has placed the Saudi government in a very uncomfortable and embarrassing bind. How can Saudi Arabia proceed with its reform agenda, which it seeks to implement of its own accord and will, without appearing in the eyes of the opposition and the world that it is submitting to the US coercive demands? (Sager 2003, 47). The burden did not only weight heavily on Riyadh. Simultaneously, Washington began to realize that Saudi Arabia’s role in the ‘war on terror’ was ambiguous at best: an important ally in the Middle East, surely, but at the same time itself (indirectly) a source of terrorism. For many in the United States, including in the halls of government, patience with the Saudis is running thin.

As 2002 progressed, voices from the American neo-conservative establishment, calling the trustworthiness of the Al Saud into question were becoming more echo-loaded. The climate was most audibly pronounced by a RAND employee, Laurent Murawiec, in July of the same year, during his presentation before the Defence Policy Board. He branded Saudi Arabia as the ‘kernel of evil, the prime mover, the most dangerous opponent’ in the Middle East. He presented a slide show with titles that included ‘taking the “Saudi” out of Arabia.’ Although government spokespersons dissociated themselves from these ideas, they can nevertheless be interpreted as a sign of Washington’s changing attitude towards Saudi Arabia, and more importantly, the House of Saud. In the same presentation, Murawiec went beyond a call for *regime change* in Riyadh. In words no less clear, he advocated taking over the rich oilfields in Saudi Arabia’s eastern provinces (and, in passing, freezing of all Saudi bank holdings in the United States). Max Singer, of the Hudson institute, had an idea of his own: why not make the eastern province, where Shi’ites are the majority, a new ‘Muslim Republic of East Arabia’? This would get the area—and its oil—out of Saudi hands.⁴ Although ‘Saudi bashing’ used to be mainly a media pastime, these opinions are now increasingly accepted with more serious analysts as well.⁵ The wind of change has not gone unnoticed in the Congress. In November 2003, a group of senators presented the ‘Saudi Arabia Accountability Act’. The Act entails imposing military and diplomatic sanctions on Saudi Arabia for allegedly failing ‘to halt Saudi support for institutions that fund, train, incite, encourage, or in any way aid and abate terrorism’ (Dawoud, 2003).⁶

1 Woolsey is a former CIA director and respected guest among the neo-conservatives. As quoted in Alterman, 2003, 158.

2 Earlier versions of this paper have been presented at the *Fifth Mediterranean Social and Political Research Meeting* of the Robert Schuman Centre, European University Institute, Florence, Italy, 24-28 March 2004; and at the conference on *Saudi Futures: Trends and Challenges in the Post 9/11, Post-Iraq War World*, ISIM (Institute for the Study of Islam in the Modern World, organised by Paul Aarts, University of Amsterdam, and Gerd Nonneman, Lancaster University), Leiden, the Netherlands, 19-21 February 2004.

3 Interview with Massoud A. Derhally, 2002 in, *Arabian Business*, available from: <http://www.itp.net/features/print/10389507740745.htm> [accessed on 12 December 2002].

4 For a recent overview, see Teitelbaum, 2003, and Leupp, 2003.

5 See a.o. Beyer and MacLeod, 2003.

6 Interestingly, somewhat later the ‘Saudi-American Forum’ launched an ‘action alert’ to oppose the act. See *Saudi-American Forum*, available on: <http://www.saudi-american-forum.org/> [accessed on 26 December 2003].

The heated debate has led some crowds—not seldom Likud sympathizers—to conclude that the American government seems to be under some kind of Saudi spell and that Washington is all ears when it comes to listening to what Riyadh has to say.⁷ The recently published *Sleeping with the Devil*, by former CIA operative Robert Baer, offers a blatant account of these sentiments. The conclusion was not quite surprising: ‘At the very least, we will have to consider seizing the oil fields’ (Baer, 2003a, xxviii). In addition, he rightly points out that this train of thought was not pulled from the air. It was in August 1975 that the Congressional Research Service presented a document titled ‘Oil Fields as Military Objectives: A Feasibility Study.’ (This document was addressed to the Special Subcommittee on Investigations of the House Committee on International Relations). At that time, both Gerald Ford and Henry Kissinger spoke openly about a possible occupation of Saudi oil fields, should the oil embargo escalate into a strangulation of American industrial capacity.⁸

Baer and his ‘partners in mind’ agree that an American invasion should not be Washington’s first option. A different, but difficult, option is available: ‘Counterintuitive as it might seem, Syria offers one way out’ (Baer, 2003a, 207). The uncompromising way the former Syrian president Hafez al-Asad stopped the Islamic opposition dead in its tracks looks very appealing and should be tried in Saudi Arabia as well. At the same time, Baer *cum suis* consider the Saudi tendency to waver in the face of opposition a liability. They do not have confidence in Riyadh’s capacity to take a firm position on this subject: ‘Failing that, there’s always the 82nd Airborne,’ he concludes (Baer, 2003a, 208). With this kind of analysis of the regime’s weakness, Baer positions himself in the camp of those that think the House of Saud will soon come to an end.⁹ The recent sequence of terrorist attacks within the nation’s borders, initially aimed at Saudi targets but later more focused at Western (in particular American) targets, is considered a token of a bad future that awaits the Al Saud.

Should we conclude from the above that we are witnessing the end of the ‘special relationship’ between Saudi Arabia and the United States and, maybe more importantly (though less explicitly discussed in these pages), the end of the Al Saud’s ever lasting authority? Has the ‘indestructible’ US-Saudi relation run out of steam?¹⁰ Especially now that we have witnessed the successful military campaign against Saddam Hussein’s regime, the relationship between Washington and Riyadh no longer appears to be worthy of pursuing. After all, or so the plea goes, the United States have endowed a withdrawal of the American troops which now call some other place in the region their home, including Iraq. Furthermore, the United States’ dependency on Saudi oil is likely to come to an end once the oil hidden in the Iraqi soil finds its way up to the surface.

Or are these claims perhaps, when further evaluated, unwarranted? Should we endorse the alternative view that the House of Saud remains steadily in power *because* of this special relationship? Saudi-American relations dating back to the 1930s—first mainly through oil firms, later also on a governmental level—seem pretty robust through all that time. That is not to say that tensions never existed, but the ‘special relationship’ has proved to be much more resilient than expected.¹¹ As

7 Under the title of ‘Who Has Bought the US Government?’, Mamoun Fandy presents a survey of this kind of doubtful analyses. Apart from the claim that the US government is fully at the service of the Saudis, there is another ‘theory’—with quite some adherents in some Arab circles—that ‘the Jews’ were responsible for ‘September 11’ (because ‘they told some other Jews’ in the Twin Towers not to go to work on that fateful day...). In *Asharq al-Awsat*, 5 September 2003, available from: <http://www1.columbia.edu/sec/bboard/gulf2000/gulf2000-9/msg02132html> (accessed on 26 September 2003).

8 The idea of an American intervention to ‘protect’ the oil fields was also brought up by Robert Tucker in the January 1995 issue of *Commentary* (‘Oil: The Issue of American Intervention’).

9 The sequence of publications predicting the ‘end of the House of Saud’, started with Aburish, 1994. Baer added some work of his own last year, Baer 2003b. It should be reminded, though, that predictions of the fall of the House of Saud go even back to Nuri al-Said in the late 1940s (with thanks to Bob Vitalis).

10 Rachel Bronson of the Council on Foreign Relations is very explicit on this in a recent conference paper (Bronson 2004).

11 The US-Saudi relationship turned sour during the oil embargo of 1973-74, but even this has to be qualified: Nawaf Obaid has shown that King Faisal resorted to the ‘oil weapon’ only after enormous domestic pressure (mainly from the religious establishment) and ‘even then took steps to mitigate the negative impact he knew this policy would have on the United

obvious as some arguments on the 'end of the special relationship' may seem, a zoom under the microscope will prove just how indefensible they are: there is a persistent logic of security and energy that binds the two regimes. Hence, the Saudis and the Americans do not find themselves 'at crossroads' and the historic oil-for-security pact is not coming apart. All in all, it seems far more plausible to assume that, for one, the Al Saud is still firmly in power, and two, that the mutually advantageous relationship between the American government and the Saudi government will be upheld for quite some time. Both arguments are closely intertwined as will be argued below. Before doing that, however, a closer look is taken at some of the 'standard' explanations of the House of Saud's longevity.

II. The Need to Look Outside the Box

The fall of the House of Saud has been predicted countless number of times, but the kingdom is not quite the dinosaur that 'instant experts' seem to think.¹² It was not only the stout heartedness of the House of Saud but of the Arab monarchies in general, that stole the show away and dazzled the crowd. Meanwhile, an interesting discussion commenced, offering an exhaustive list of different recitals which might explain the 'resilience' phenomenon, some of course having more exegetic power than others. One point is certain: no single vindication has been able to elucidate the stability in all these intriguing cases. This paper cannot go into all the causes offered, but a small sample will serve our purpose.¹³

Fred Halliday has warned us not to replace the 'republican telos' of the fifties and sixties with a modern 'monarchical telos'. As the strategy has proven its attractiveness to many academics, this warning is quite in its place (Halliday, 2000, 291). After the collapse of the monarchical regimes in Egypt, Iraq, Libya and Yemen in the fifties and (early) sixties, many scientists started to think that the monarchy has already had its florescence, and that republicanism was heading towards the lighting future.¹⁴ The modernisation perspective of Daniel Lerner's *The Passing of Traditional Society* (1958) and Samuel Huntington's *Political Order in Changing Societies* (1968) modelled the train of thought concerning this subject. The 1970s, '80s and '90s—with the obvious exception of Iran—have however proven the persistent character of numerous monarchies. This perception eventually led to a revision of the academic perspective. Michael Hudson's *Arab Politics: The Search for Legitimacy* (1977) was the first book to acknowledge that monarchies might be more enduring than hitherto expected. It was followed by a.o. Hisham Sharabi's *Neopatriarchy: A Theory of Distorted Change in Arab Society* (1988). All these authors subscribed to the idea that local (or regional) political culture was central to an explanation of the persistence of the monarchical system in the Arab world. In 1991, Lisa Anderson made a decisive contribution to the debate about monarchy's longevity by giving a more functional explanation (Anderson, 1991).

All these recitals, although not lacking the expressiveness, have their own weak spots. Gregory Gause has done a nice job when he summarized these weaknesses and a replication of his piece will be brushed aside here (Gause, 2000b). What is important to bear in mind, is that all these explanations—together with what later came to be known as the 'rentier state' perspective—limit themselves to internal causes.¹⁵ The same goes for more recent contributions to the debate like those of Michael

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States' (Obaid, 2000, 99). Richard W. Murphy opines that 'Many Americans would be surprised to learn that, over the decades, our bilateral relationship has not always been smooth sailing. [...] However, the strength and importance of the US-Saudi relationship during the Cold War was beyond dispute' (Murphy, 2004). For a thorough historical exposé, see Vitalis 1997 and 2002. In a recent essay, Vitalis argues that the past is much similar to the present, i.e. that there is nothing 'unique' in the annals of the 'special relationship' (Vitalis 2004).

12 A brief survey is given by Peterson, 2002, 68.

13 For a preliminary list of 'causes and dynamics of regime stability in the Middle East' (i.e. not focusing on monarchies in particular), see Schlumberger & al-Khazen, 2003, 4-5.

14 The fall of the Pahlavi regime in Iran—though somewhat later—seemed to corroborate that once more.

15 Strikingly, these critiques are mentioned more often with regard to explanations of the 'Arab democracy deficit'. For a short review, see Gambill (2003). For a convincing critique of the most prominent argument of the rentier state theory—

Herb's *All in the Family* (1999), Daryl Champion's *The Paradoxical Kingdom* (2003) and, less extensively, Neil Quilliam and Maggie Kamel's 'Modernising Legitimacy: Saudi Strategies (2003).'¹⁶

Each of the explanatory frameworks that focus on local actors and factors naturally leads to important insights, but none of them offers a sufficient elucidation for the persistent character of the monarchies, not even when all of them are taken together. The answer we are looking for lies somewhere 'outside the box'. It appears to be far more conceivable that the crucial difference between the success and failure, and the persistence and fall of monarchies can be found in the regional and global strategic-economic picture, rather than in the local one. To the very least a combination of the two perspectives is necessary to get to a reasonable explanation. It would be rather simplistic to attribute the survival of regimes *solely* to external backing, but it would equally be naïve to suppose that such support (or the lack of it!) would be of no importance (Halliday, 2000, 16).

For now, we can line up with Halliday and conclude that the survival of monarchies is contingent and that a 'monarchical telos' should therefore be avoided: 'In the Middle East, as elsewhere (e.g. Europe and Asia), the establishment and the survival of monarchies bears *no necessary* relation to modern politics: it is a contingent matter, established, maintained, and, when it so happens, terminated by the balance of political forces' (Halliday, 2000, 291, italics in original). The chances of survival are as much dependent on the capacity to build dependable international alliances as on mobilizing economic resources and internal coalitions. International alliances as an explanatory variable for regime persistence are regrettably too often disregarded and will therefore receive additional attention in the following paragraphs.¹⁷ But let us first concentrate on the much-discussed instability of the Saudi regime.

III. Instability within Stability¹⁸

Saudi Arabia is normally considered to be the archetypical Islamic state. More than anywhere else in the Islamic world, the House of Saud exploits religion in order to legitimize its dynastic ascendancy. This immoderate reliance on Islamic legitimacy is not a risk-free enterprise, something that is clearly visible in Saudi society. An important risk is the exposure to criticism from pious 'brothers of the faith' who consider the country's leadership to be corrupt, pro-western and 'un-Islamic'. Apart from this Islamist opposition—which sometimes takes a violent character—there is a small secular liberal¹⁹ opposition within Saudi Arabia's intelligentsia, including a few princes from the royal family itself. These 'free princes', however, have never managed to gain a substantial number of followers. In addition, opposition groups from outside the royal family have until recently been a nonexistent phenomenon—apart from regular workers' uprisings like those in the fifties and sixties in the eastern oilfields or those connected to regional events like the revolution in North Yemen or the June war of 1967. However, since '9/11' the royal family encounters citizen opposition more frequently. It is this

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i.e. 'no representation without taxation'—one should consult Michael Herb's recent 'Do Rents Cause Authoritarianism?' (2002). An equally strong critique, applied to the situation in Saudi Arabia, can be found in Okruhlik (1999).

16 In *All in the Family*, Herb explicitly distances himself from the rentier state thesis and contends that the chief goal should be to study political institutions—in this case the monarchical dynasty as a family. Champion (2003) introduces the term '*asabiyya* capitalism'—defined as a political-economic system based on kinship, *wasta* and other kinds of personal relations. Also, the stability of the Saudi monarchy can be credited to a large extent to other factors, like the chronic dividedness of the opposition (see main text above). Quilliam and Kamel (2003) focus on the Saudi regime's use of a mix of strategies: shaping public discourse, Islamicisation and education, consensus, rentierism and patrimonialism, exporting dissidents and coercion. Byman and Green (1999) focus almost exclusively on internal factors, although they do have eye for the possibility of external intervention (like Iran's interference with Bahrain) that might threaten the survival of a monarchical regime.

17 Apart from Halliday and Gause, it is Mary Ann Tétreault who concerns herself in particular with the external contingency of state survival. See her seminal contribution 'Autonomy, Necessity, and the Small State: Ruling Kuwait in the Twentieth Century' (*International Organization* 45 (4), August 1991, pp. 565-591), a case study of Kuwait.

18 Title of chapter 5 in Champion (2003).

19 See footnote 26.

strengthening of opposition, combined with a changing social-economic environment, which leads to questioning of the Al Saud's stability in the long run.

III.1. *The Islamist Opposition*

The regime in Riyadh has more than once been the focus of criticism from those citizens that follow a stricter interpretation of Islam. It is here that the Al Saud's religious legitimatization proves to be a double-edged sword that is used with special fervour by the activist part of the clergy.²⁰ They remind the King of his responsibilities as 'Custodian of the two Holy Mosques' and more or less publicly call attention to the Saud family's shortcomings in that role. This tradition dates back to the early twentieth century, reaching its highest point in November 1979 with the siege of the mosque in Mecca by a group of zealots under the leadership of Juhayman al-Utaybi and Muhammad al-Qahtani. The mosque's siege revealed the tension between the Saudi state and its religion.

In retrospect, the occupation of the mosque would only prove to be 'the tip of the iceberg' (Dekmeijan, 1994). A number of factors worked together to help the neo-fundamentalist protest in the 1990s grow into a formidable political force. Since the early 1980s, income from oil exports went downhill and was accompanied with various economic problems. The second Gulf war (1990-1991) further increased economic pressure by the huge military costs it inflicted on the country. What was even worse in the eyes of the Islamist opposition—already enraged by the 'western' lifestyle of the royal family—was the welcoming of hundreds of thousands of 'heathen' American troops.²¹ Furthermore, the financial burden of the military operations was too much to bear, even for a fairly prosperous country such as Saudi Arabia. Once again the mellow ulema let themselves be compelled into pronouncing a fatwa 'on request' from the House of Saud, in which they declared the Iraqi leader to be an 'enemy of God'. This defined the war against Iraq as a *jihad* and thus allowed non-Muslim soldiers—at least in the eyes of the highest cleric, Sheikh Abd al-Aziz Bin Baz—to participate in fighting on Saudi soil.

Since the Gulf war resistance from Islamist groups has increased considerably.²² The commonality has shown its discontent in various ways—among other things by presenting petitions to the King (Dekmeijan, 1994). In an open confrontation with the regime, six renowned Islamists publicly announced the foundation of Saudi Arabia's first human rights organization, the 'Committee for the Defense of Legitimate Rights' (CDLR). This committee expeditiously became the voice of a genuine opposition movement, which was then, unsurprisingly, banned. This led to the creation of an electronic *samizdat* in 1994, based in London, which functions successfully to this day (aside from some institutional and personal changes in the organization).²³

The rigid repression in the mid-1990s increased the tension between the religious legitimatization of the regime and its policies and thus led to an increasing criticism of its 'un-Islamic' character as an unintended consequence. It was in these conditions that Usama Bin Laden made himself heard more explicitly, at first through his 'Advice and Reform Committee' (Fandy, 1999, 177-194).

As long as Bin Laden—and many other Saudis (some sources speak of as many as 25,000)—were concerned with the 'jihad of the day' in Afghanistan or elsewhere, they did not pose a problem to the Saudi royal family (Champion, 2003, 240; Quilliam & Kamel, 2003, 51). Although there were some

20 Strictly speaking, of course, Islam has no church and no clergy in the sense of an elaborate ecclesiastical hierarchy. The Saudi ulama may act like a clergy but they are not a clergy in the Christian sense. Nonetheless, for want of a better term we will use it here.

21 Okruhlik strongly argues that with the Gulf war of 1991 domestic turmoil intensified, but '[T]he war did not create new forces of change; rather, it accelerated the political debate long underway' (1999, 302).

22 For a more comprehensive study of this, see Steinberg (2003) and Okruhlik (n.d.). Both authors stress the variety of Islamist movements. Okruhlik coined the term 'multiple clergy.' Recent studies were done by Okruhlik (2004) and Lacroix (2004).

23 In 1996 a schism occurred in the CDLR. Muhammad al-Mas'ari went on by himself while his associate, Sa'ad al-Faqih, founded the Movement for Islamic Reform in Arabia (MIRA, homepage: <http://www.yaislah.org/>). For a concise overview, see al-Rasheed (2002, chapter 6). Alternatively, for a more extensive study, see Fandy (1999).

incidents on Saudi soil—sometimes of a violent nature—they remained limited to attacks on American objects or persons (like in 1995 and 1996). The Saudi policy of ‘exporting’ troublemakers and their radical Islamist ideologies elsewhere has functioned to full satisfaction for many years.

To the extent that disruptive clergymen remained within the Saudi borders they were restrained by a mix of repression and cooptation. On more than one occasion these activists were given more freedom of expression, for example by being allowed to be more critical about American support of Israel, in exchange for an oath of allegiance to the royal family. Still, not many clergymen needed to be co-opted in this way—estimates hover around 150 on a total of 10,000 (Jehl, 2001). At the same time the activist clerics are very provocative—when not in jail—with a habit of drawing a great deal of attention on each occasion that allows it (also via the World Wide Web available in Saudi Arabia since 1999). Recently they have been joined by violent groupings, sometimes associated with Bin Ladens nebulous al-Qa’ida ‘network’. They often make themselves noticed through spectacularly performed attacks on diverse targets, not excluding the Saudi regime. The attack of May 2003 constituted a wake-up call to the House of Saud, just as the September 11th attacks awakened the United States to the global nature of threat posed by al-Qa’ida. Since May last year, the Saudi government has arrested scores of individuals with suspected ties to terrorism while large numbers of Saudi policemen have been killed in anti-terrorist operations. It is too early to speak about ‘A Battle of Algiers’ scenario in Riyadh, but surely there is a dramatically altered internal security environment.²⁴

It is, however, important to bear in mind that most ulama are indulgent with the government. This has been the case since the early days of the Kingdom of Saudi Arabia—and in fact even since 1744 when the pact between the Saud family (through Muhammad ibn Saud) and the Al Shaykh was forged. The Shaykh family are the descendants of Muhammed ibn Abd al-Wahhab (1703-1792), whose followers are known as Wahhabis or Wahhabiyyun.²⁵ This coalition of worldly and religious power, ‘those of the sword and those of the pen’ has led to a division of labour that has held well and to a large extent still holds: a sort of ‘social contract’ where the religious establishment takes care of a proper ‘Islamic morality’ considering education, women and public virtue, and gets free reign in these matters as long as they do not question the legitimacy of the monarchy. Of course it’s hard to tell, but it seems unlikely that under these conditions the Islamic opposition will ever manage to grow into a mass movement.²⁶ Does the same hold for the liberal opposition?

III.2. *The Liberal Opposition*

It is only since ‘9/11’ that the liberal-secular²⁷ opposition started to speak out and to some extent pushed the dissident clergy onto the defensive. The liberal groupings have made themselves heard in the past (notably in the mid-1960s and early 1990s) but this time their ideas seem to find more fertile ground than ever before. It all began in January 2003 when the crown prince was offered a petition

24 Press reports indicated that the movie ‘The Battle of Algiers’ is being shown in various Pentagon offices to highlight the difficulties of fighting an entrenched insurgency in the region, as reported by Russell (2003). See Cordesman (2004b) for a recent survey of terrorist attacks in the Kingdom, including a chronology of counterterrorism efforts taken by the government. Up to the time of writing (late June 2004), Saudi oil facilities had not yet been targeted. On this, see John Bradley’s ‘Attack exposes Riyadh jugular’ in *The Straits Times*, 1 June 2004.

25 Followers of Muhammed ibn Abd al-Wahhab’s doctrine do not call themselves ‘Wahhabis’, but *al-Muwahidun* or *Ahl al-Tawhid* (‘the asserters of the divine unity’). Using the word ‘Wahhabi’ would imply the worship of a person (Muhammed ibn Abd al-Wahhab), which is taboo. An iconoclastic view of Wahhabism as ‘non-Sunni’ is given by Algar (2002). The term ‘Wahhabism’ is used incorrectly a lot of times, especially when concerning al-Qa’ida. See Azzam (2003) and El Fadl (2002). El Fadl coined the term ‘Salafabism’ (i.e. ‘[...] this unity of Wahhabism with the worst that is in Salafism’, p. 14). More recent studies on various aspect of Wahhabism, see Steinberg (2004), Al-Fahad (2004) and in Abu Khalil (2004).

26 For a possible different scenario, see note 37.

27 The notions ‘liberal’ and ‘secular’ in this context refer to those Saudis who want to diminish the ulama’s influence in politics and society; they are, generally, speaking, in opposition to the Islamists. In Saudi Arabia, they do not necessarily propose a complete separation of state and religion. See Steinberg, 2003, p. 35.

called 'A Strategic Vision for the Present and Future', by a hundred renowned professors, intellectuals, and former top administrators—identified by a Saudi watcher as 'the best and brightest' (Dekmeijan, 2003, 400-413). This first petition was supplemented in September by the one that read: 'In Defense of the Nation'. The authors—about three hundred intellectuals among which, strikingly, a number of moderate Islamists—pledged to support the crown prince in his battle against terrorism, but at the same time did not hesitate to point out number of serious shortcomings in the Saudi political system.

Both the January and September document are clear about 'the way forward': demands are made for more political influence, respect for human rights, increased rights for women and a clear separation of judicial, executive and legislative power. Remarkable (at least in the September document) was that it not only contained open criticism of the conservative clergy's excessive influence on the religious curriculum, but that it also targeted the religious police (*mutawwa'in*) and did not even spare Ibn Taymiyya (1263-1328), one of the ideological fathers of both Abd al-Wahhab and many modern-day Islamists.

It should not come as a surprise that social and economic issues are a pre-eminent concern of the citizens' initiatives. Clearly there is growing discontent about the corruption of the Saud family and its lackeys, the towering defence expenditures and the growing poverty. In 1980 Saudi Arabia was one of the wealthiest countries in the world. Today the Saudi economy has to support double of its former population on a *real* income that has not increased much over the past quarter of century.²⁸ GDP per capita dropped to \$6,660 in current dollars in 1994, following the strains of massive expenditures on the Gulf war and relatively low oil revenues. Brad Bourland of the Saudi American Bank (SAMBA) projects a figure of \$8,824 in 2004. These figures are much lower than the peak oil boom per capita figures that reached levels of \$30,000 in 1980. Even though the country remains the world's greatest oil exporter (with the largest reserves), the profit from the oil exports fails to exceed the amount that American people spend on cigarettes on the yearly basis (though this may have changed recently due to substantially higher oil prices).²⁹ All this has resulted in a year-after-year budget deficit dating back to 1983. It is only recently, i.e. since the late 1990s, that Saudi Arabia ended its fiscal year with a current account surplus while the government budget has turned into black figures again in 2002. 'It does [...] buy time and the near and mid-term economic pressures on Saudi Arabia are more limited than in virtually all of the other countries in the Middle East' (Cordesman, 2004b, 14).

These higher oil revenues are no reason for complacency, however.³⁰ The government cannot afford to slack off on economic reform, in particular with regard to the country's demographic crisis. Recent figures show a massive population growth that is still gathering momentum, which will continue to accelerate through at least 2010. Saudi Arabia has a birth rate of 3.4 percent, which means that those younger than 25 comprise 60 percent of the total population (42 percent is under 15). An obvious, concomitant problem is unemployment, which is rising at an alarming rate. Although the official statistics do not show reason for concern, the gravity of the situation becomes clear when we distinguish certain age groups. In the category of 20-24 years, especially among new graduates, the percentage climbs to 27 percent for men and 33 percent for women (al-Rostani, 2003; Cordesman, 2004b, 21; Sez nec, 2004, 3).

At certain points in time, the regime has made some small and cautious concessions towards the liberal as well as the Islamist agenda (which happen to correspond on some issues). For example, in 1992 king Fahd tuned the Basic Law, and a year after that the Shura council, first comprising of 60 (appointed) members, later (1997) extended to 90 and in 2001 to 120. This council is only a consultative body—it cannot pass laws and can only counsel the King if he demands this—but over the years it has developed into a more serious political institution. The recently appointed members are

28 BBC: 'Saudi Budget returns to deficit', 15 December 2003, available from: <http://www1.columbia.edu/sec/bboard/gulf2000/gulf2000-9/msg02391.html> [accessed on 23 December 2003].

29 In fact, the International Energy Agency (IEA) estimates that that Saudi Arabia earned some \$55 billion from petroleum exports in 2002, but that 2003 was even better. With oil revenues amounting to \$80.9 billion, the Kingdom reached the highest level in 20 years (Cordesman, 2004b, 9).

30 For a recent, and challenging, discussion of Saudi Arabia's political economy of reform efforts, see Hertog, 2004.

mainly technocrats, business people, academics, and—notably enough—also two Shi'ites. There are no members of the royal family in the council (Seznec, 2002, 4).

In April 2003, Prince Nayif, Minister of the Interior, announced the establishment of two human rights organizations: one consisting of government executives and another of civilians not related to the regime (named the National Human Rights Association, NHRA).³¹ The act has generally been interpreted as an antidote to the criticism of diverse Saudi dissident groups operating from outside the Kingdom (Dekmeijan, 2003, 410). Even more interesting was the petition a group of Shi'ites offered to the crown prince on the 29th of April last year—possibly facilitated by the war in Iraq and the contingently uncontrolled public debate. In the same month women once again made themselves heard and one of them even insisted on the inclusion of women into the Shura council. Four months later the 'King Abd al-Aziz Centre for National Dialogue' was opened, a forum that has since hosted a number of debates—behind closed doors, but with women present and, for Saudi norms, with an impressive range of opinions.³² To top it all off, in October the government announced the first municipal elections, to be held in 2004. Later they were rescheduled to early 2005 (*Arab News*, 27 May 2005).

For Saudi custom all this may be seen as huge leaps of reform, but in comparison to the country's problems, especially in the realm of economics, they are more aptly viewed as 'baby steps'. Considering the economic predicaments, the Al Saud shows again its legendary inertia in dealing with serious problems of any kind, whilst knowing that the distributive-welfare state cannot be sustained (Champion, 2003, 310-311). Apparently they can afford the ignorance as a policy solution, although the regime also benefits from the weakness, and especially the dividedness, of the opposition (Sager 2004). This factor goes a long way in explaining the Al Saud's stability and so the internal causes will not lack attention in the following paragraph.

III.3. *The Collapse of the Regime?*

The violent assaults of May and November 2003 (both in Riyadh), and the seemingly unremitting series of terrorist attacks in the first half of 2004 (in Riyadh, in Yanbu and in Khobar amongst others) may seem to have strengthened the liberal opposition's stand on political reform, but the effect works against reform as well. With internal terrorism on the rise, a likely reaction from the government is to ask reformists to hush their demands in the 'national interest' of stability. Saudi Arabians in the street now indeed seem to accept the ruling family's line that change should not come at the expense of security. 'Even' crown prince Abdallah has fallen into line. He speaks now the same language as his chief rival for power, prince Nayif, seen as most active in stalling serious reform efforts (Jones, 2003).³³ It remains unclear whether the opposition will heed this demand made upon them, but even in the case that they would *not* do so, this would not put the regime in the danger zone. Apparently—and notwithstanding the fact that the regime is continuously being challenged, its legitimacy eroded, and its credibility weakened—the House of Saud remains firmly in the saddle, also perhaps by default because of the opposition's weakness (see below).³⁴

Moreover, the intricate mix of power strategies employed by the Saud family is important in this respect. It is hard to indicate an order of importance, but we will simply name three of the most important

31 January 2003 saw the first Human Rights Watch delegation gain access to the country (*Arab News*, 3 March 2004).

32 Three meetings have taken place. The first, inaugural session took place in Riyadh (June 2003); the second one in Makkah (December 2003) on the topic of 'Extremism and Modernism: A Thorough Review'; and the latest one in Medina (June 2004) on 'Women's Rights and Duties and Their Relation to Education'.

33 For a recent analyses of the 'two camps' within the royal family, see Scott Doran (2004). He speaks about the 'Power of *Tawhid*' versus the 'Call of *Taqarub*'.

34 More details: Champion, 2003, 248-258; al-Rasheed, 2002, 217. Both authors are outspoken on the fact that voices of dissent are 'scattered', 'heterogeneous', 'fragmented', 'disorganised', 'unprepared' and 'lacking in any form of organisation'. Also see Steinberg, 2003, 51.

strategies here. For one, the House of Saud's history as founder of Saudi Arabia as a nation and guardian of the Holy Places is used to legitimize its rule (even though this argument cuts both ways, as we have seen). Also, the use of oil income to create an sophisticated patronage system to 'buy' national stability is an important ingredient (even though this instrument weakens during periods of lower oil revenues). Finally, unscrupulous repression by force is sometimes used to silence opposing tones.³⁵

Of course, if these strategies were to fail there still would not be any opposing organization strong enough to challenge the reign of the Saud dynasty (not to mention doubts about the liberal opposition's *ambition* to replace the Sauds).³⁶ Even the Islamist opposition is divided, and is further handicapped because some of its leaders lack credibility among the population. In addition, the Islamists have never managed to gain the confidence of the Shi'ite minority (6-10% of the population) which has been driven to cooperate with the government, though cautiously, and motivated by other reasons as well.³⁷ The only group that is organized to a sufficient extent for challenging the House of Saud is the army, but it is unclear which position in the Saudi political arena its leaders subscribe to, and it is as clear that little can be expected of it in terms of decisive political action (Steinberg, 2003, 23).

Even less predictable is the reaction of Saudi youth to the severe economic problems. Their situation is probably comparable to that of their contemporaries in Iran: growing discontent without ways of affecting the situation, and, worse, without offering a credible alternative for the incumbent regime in Tehran. The same probably goes for a large part of the population that considers the alternative to the House of Saud to be chaos.³⁸ For all the reasons mentioned above, *regime change* is not a likely option, *leadership change* at most, i.e. a palace revolution if conflict erupts over succession to the throne (Champion, 2003, 295).

IV. The Saudi-American Connection: The Security and Military Component

Apart from domestic factors, the international political environment puts in a lot of weight if we want to explain the Al Saud's steadfastness. A decisive factor in this respect is Saudi Arabia's relation with the United States. Although some in Washington are recurrently suggesting to cut off its relations with Riyadh (leading to the hasty conclusion that 'We're heading for a divorce'), these statements should be

35 In a recent interview, Bernard Haykel adds a few interesting observations to this: '[...] I think that most Saudis realize that the country as it is currently constituted can only be held together under the Saudi royal family. Otherwise, it would split up into three provinces, if not more: the Eastern Province, the Hijaz and Najd, which would probably continue to be ruled by the Saudis. So the leadership has staying power by virtue of history, by virtue of the many individuals involved, and also by virtue of the fact that the ruling family is not ideologically monolithic. The whole political spectrum of the Arab world is represented in these princes and this, to my mind, is a source of strength' (<http://www.bitterlemons-international.org/previous.php?opt=1&id=31>, accessed on 31 March 2004). On the other hand, one should be aware that the regime itself is putting a lot of effort in promoting the 'unique nature of the unity of the Kingdom of Saudi Arabia.' It tries to draw Saudis 'into its construction according to well-defined rhetoric, images and symbols.' See al-Rasheed, 2002, 217.

36 As Peterson (2002, 67) perhaps rightly noted, 'Anecdotal evidence [...] suggests that most Saudis do not want a different political system; they just want the present system to be fairer and more responsive.' In a similar vein, applicable to the Arab world as whole, Carol Hakim notes that there is a clear lack of a credible alternative, which has in turn contributed to the perpetuation of the status quo and '[...] left incumbent regimes as the "default option" to manage the crisis' (Hakim, 2004, 27).

37 Steinberg (2003, 29-31) is one of the very few authors who speculate about the possibility that the Islamist opposition may further coalesce with both regional and tribal forces. The clearest indication of that is, of course, to be found in the composition of the fifteen Saudi hijackers who flew into the World Trade Center. At least three of those, maybe five or even six, originated from 'Bilad al-Ghamid', mainly located on the border of the Najd, the Hijaz province and Asir. More on the 'tribal-Islamist collusion' by Bradley, 2003. The most detailed report, to my knowledge, on the 'Asir connection' of some of the hijackers has been delivered by the *Boston Globe* in a series of articles between 3 March and 5 March 2002, under the main title of 'Driving a Wedge: Bin Laden, The US and Saudi Arabia', available from: <http://www1.columbia.edu/sec/bboard/gulf2000/gulf2000-9/mgs00889.html> [accessed on 19 March 2002].

38 On the 'silent majority', also see Russell, 2003, 5.

taken with a grain of salt. Could it be that—even in the light of ‘9/11’ and the recent terrorist assaults on Americans working in Saudi Arabia—the link between the two countries is a rather irrefragible one?

First of all, it is striking to see how much trouble the American government is taking to maintain good relations with Saudi Arabia—the same as the Saudi government tried to do back in 1973-74 (see note 11 above). Energy Secretary Spencer Abraham is cultivating Saudi Arabia and Washington is enduring great pains to stub out the slightest suggestion that the Saudi regime could have had anything to do, even indirectly, with the events on September 11, 2001. A number of incidents can be seen as showcases of this commitment. A high point was the crisis over the 28 pages that were kept secret out of a 900 pages document put together by Congress (on ‘9/11’). It was ‘security issues’, according to president Bush, that demanded such a level of secrecy. The disclosure, by *Vanity Fair*, of the fact that many influential Saudis, among them royal family as well as members of the Bin Laden family, were flown out of the United States in private jets only shortly after ‘9/11’, also raised a lot of commotion. Through this course of action the American government denied itself access to a number of important witnesses. The most probable explanation of this exercise is the community of interest of the Bush, Saud, and Bin Laden families. The notorious Carlyle group, with George H.W. Bush and former Minister of Foreign Affairs James A. Baker, is the most visible expression of the community in question. ‘It’s always been clear that there are deep ties between the Bush family and the Saudis,’ says Charles Lewis, head of the Center for Public Integrity. ‘It creates a credibility problem. When it comes to the war on terror, a lot of people have to be wondering why we are concerned about some countries and not others. Why does Saudi Arabia get a pass?’ (Lewis in: Unger, 2003).³⁹

A remarkable fact is that trade ties between the two countries have even been strengthened since ‘9/11’—although a short-term recession was scored in the phase following the attack of September 11, 2001. ‘There have been expectations about lower trade with the United States and calls for turning to other industrial countries following the September events’, said Abdul al-Dakheel, a Saudi economist. ‘But I don’t think there has been any major impact on bilateral commercial exchange despite political tensions. Saudi Arabia is still the largest economic partner and oil exporter to the United States in the region’ (Kawach, 2003). Investment provides an important connection as well, although this is more of a one-way affair. It is estimated that Saudi Arabia keeps possibly as much as a trillion dollars on deposit in US banks and the Saudis hold another trillion dollars or so in the US stock market (Baer, 2003, 60).⁴⁰

Security provides another issue where the two countries share a common interest dating back to 1945 when Ibn Saud received a pledge from Franklin Roosevelt that the United States would at all times guarantee Saudi territorial integrity. In the following decades, the agreement developed into a full-blown *quid pro quo*: in return for the American protection from external threats and favourable trading terms, Saudi Arabia would seek to provide sufficient oil at reasonable prices and would ‘recycle’ its income by purchasing arms and other American goods.

Indeed, Saudi Arabia has been the destination of a great number of American arms exports. In fact, Saudi Arabia is such a good customer of the American arms industry that it managed to single-handedly support the same industry through all these years. Saudi Arabia spends more on defence per capita than any other country in the world (more than one third of its budget). The total value of American arms sales to Saudi Arabia over the past half-century approaches \$100 billion, with over a quarter of the contracts signed in the 1990s. These figures include weapons, support equipment, spare parts, support services, and construction (Pollack 2002, 35-39; Peterson 2002; Russell 2002).⁴¹ The best

39 Recently, Unger added a book on the relationship between ‘the House of Bush’ and the House of Saud. See Unger, 2004.

40 Lower estimates in Peterson, 2002, 35 (note 35).

41 Cordesman (2004b, 9) reports that Saudi Arabia bought \$6.6 billion worth of new arms during 1995-1998 (\$4.9 billion from the US) and signed \$4.1 billion worth of new arms agreements during 1999-2002 (\$2.8 billion with the US).

known military facility in the country, built by the Americans, is the Prince Sultan air base ('PSAB', located south of Riyadh) that has been the home to some 4,500-5,000 American soldiers since 1991.⁴²

The presence of these troops is one of the things that aggravate Bin Laden and his followers, and he never missed an opportunity to avow that he wanted to see an end to that presence.⁴³ To both Washington and Riyadh this constituted a devil's dilemma: how to remove the American presence without seeming to give in to Bin Laden? The solution announced itself quicker than expected after the Iraq war, which did away with the need for a military presence on Saudi soil. Already in April 2003 the announcement was made that most American troops would leave the country. This cut the Gordian knot that had tied the two countries together since 1990.⁴⁴ At the same time, it is hardly imaginable that, with the exception of Kuwait, other Gulf States (like Qatar and Bahrain) would take in American troops without Saudi consent.

What's more, during the war, the Saudis had covertly supported the American expedition to Baghdad. 'Saudi Arabia [was] the hidden player in the American war on Iraq' (Guttman, 2003). Even though the American bombers were not allowed to take off from Prince Sultan air base, the command and control centre on that base was used intensively. Saudi Arabia was conducive to the American war effort in many other ways as well (Gresh, 2003; Dinmore and Khalaf, 2003). Virtually every request made by the Bush administration for military or logistical assistance was met positively. 'We would never have been able to conduct the war against Iraq as we did without Saudi assistance,' admitted an American diplomat in Riyadh (Gresh, 2003).⁴⁵

Even after the war on Iraq, the military bond between the countries has not been cut off nor is it likely to be in the near future. As a seasoned observer remarked, 'Saudi Arabia remains dependent on the United States for training and technical services. It cannot sustain independent combat without US support [...] and it cannot use many of its air control and warning assets without the US back up. [...] Any break with the United States would virtually derail its modernization efforts' (Cordesman, 2003). Still, both Riyadh and Washington are in high spirits over the almost total removal of any *visible* operational component on the Prince Sultan air base, but it is clear that in a different, less visible way there will remain a strong American involvement in the military infrastructure of the kingdom of Saudi Arabia (Russell, 2002; Cordesman, 2003).

V. The Oil Dimension: No One Swings like the Saudis

Apart from the security interests, including those of the American military-industrial complex, there are of course the oil interests. It would appear to be a simple and obvious issue—the United States accounting for one fifth of the world oil consumption—but a closer look reveals a more complex situation. Even if the United States were to reduce its oil imports from Saudi Arabia or were to refrain from using Saudi oil altogether, it would still be in Washington's best interest to preserve a healthy relationship with Riyadh. There are four motives to explain this.

42 Before 1990-1991 only a small number of American soldiers were present within Saudi borders, most of these 'over the horizon'.

43 See, e.g., his 'Declaration of War' (August 1996) en his call to establish the 'World Islamic Front for the Jihad Against the Jews and the Crusaders' (February 1998).

44 Bob Vitalis opines, however, that it should be remembered that the US had given up bases under pressure before—at no cost. Speaking in terms of 'dilemmas' is just part of a 'rhetorical strategy', he argues (personal communication, February 2004).

45 More, sometimes rather spectacular, details are given by Dobbs, 2003; and Bradley, 2004a. The *Los Angeles Times* reports that during the invasion of Iraq 10,000 troops were stationed at the PSAB (Stack, 2004). It also quotes several Islamist websites which warn that word of a troop withdrawal was a lie. 'The infidel soldiers weren't going anywhere,' the websites argued. 'It was just government propaganda.'

In the wake of 'September 11', there is an increasing voice in the United States, especially among neo-conservative circles, to minimize the Saudi relationship and import the oil from elsewhere.⁴⁶ Russia (which in 2003 surpassed Saudi Arabia as the largest oil producing country in the world), scores a high place on the 'alternative list' followed (at a considerable distance) by Caspian Sea countries and some oil producers in Western Africa. All these alternative sources could supplement the imports already flowing from countries closer to home, such as Canada, Mexico and Venezuela. How realistic is this aspiration? Can the United States do without Saudi oil? The short term prospects are certainly not very promising: Iraqi oil production is taking its time to get up to speed while oil from Russia or the Caspian Sea countries cannot easily find its way to the world market due to, among other factors, problems of infrastructure.⁴⁷ Apart from that, the oil reserves in the mentioned countries are far less extensive compared to those in the Persian Gulf countries (Russia, for example, holds 4.6 percent of the world oil reserves whereas Saudi Arabia stands at 25 percent), while at the same time production costs are substantially higher than in the Middle East.⁴⁸ There are more reasons why it is highly unlikely that Russia is able to act as a ministering angel and, thus, for the time being the United States' dependence on Saudi oil (at about 1.7 million barrels out of 11 million per day) seems hard to 'cure'.⁴⁹

There is a second motive for the United States to preserve its good relation with the world's second best oil producer. American oil consumption keeps increasing (1,7 % per year until 2025) and will unavoidably lead to greater imports.⁵⁰ While imports now 'only' constitute half of American consumption, in 20 years' time this will increase to over 60 percent. This growing import dependence was clearly indicated in the 2001 'National Energy Strategy Report'. A big part—more than the present quarter—of the needed imports will originate from the Persian Gulf, including from Saudi Arabia (although, relatively speaking, the role of Saudi oil might diminish once Iraqi production gets underway and we can also expect an increasing flow of Russian oil). Still, Washington is rightly worried about availability of oil for its own market. This concern dates back to January 1980, when president Carter decreed the doctrine now named after him, which states that unrestricted access to the Persian Gulf is a vital interest of the United States and that, in protection of that interest, the US will employ 'any means necessary, including military force' (Klare, 2003, 4).⁵¹ Today, the Carter doctrine is as vital as ever.

A third motivation is closely connected to the latter issue. It does not only involve trying to safeguard the 'national' supply, but rather the international supply through relations with pro-American regimes in the Middle East. It then becomes possible to severely limit the autonomy of potential rivals. As Dick Cheney once put it in his testimony before the Armed Services Committee: Whoever controls the flow of Persian Gulf oil has a 'stranglehold' not only on our own economy but also 'on that of most of the other nations of the world as well' (Klare, 2003, 5). In this respect the position of the People's Republic of China, as well as that of Japan and the EU—all more dependent on Persian Gulf oil than the United States itself—is important. It is a truism that the Chinese are not

46 An eloquent example of neo-conservative 'oil-thinking' is presented by Singer, 2003. Morse (2003) gives a insightful analysis of the neo-con view of oil. High on this revisionist agenda are: lowering prices, undermining OPEC, using the oil weapon to isolate Libya and Iran, and fostering private ownership of oil resources. Also see Judis, 2003. Interestingly, the role of *Saudi Arabia* as a target of the neo-conservatives' 'revisionist' agenda does not figure in Morse's overview, while it figures prominently in Judis's.

47 More on this by Barnes, Jaffe and Morse, 2003-2004. The message is simple: other sources, other problems.

48 Curiously, some recent sources name significantly higher estimates of Saudi oil production costs. See David Ignatius, 'Revising the Forecasts for Saudi Oil', *Daily Star*, 17 November 2003. For the more conventional figures, see IEA, June 2004.

49 In 2003, Saudi Arabia ranked second (after Canada, and just ahead of Mexico) as a source of total (crude plus refined products) US oil imports, and first for crude only (ahead of Mexico, Canada, and Venezuela (IEA, June 2004).

50 *International Energy Outlook 2003*, available on: <http://www.eia.doe.gov/oiaf/ieo/oil.html> [accessed on 20 November 2003]; also Barnes, Jaffe and Morse, 2003-2004.

51 All this talk on the 'access to oil' should, of course, not lead to the vulgar conclusion that the Iraq war was 'all about oil'—as some want us to believe.

going to be content with long-term second-class status and, thus, will speed up their use of energy, oil in the first place. China is already importing 60 percent of its oil from the Persian Gulf and the percentage is likely to increase to 80 or 90 percent in the coming two decades.⁵² In 2002 car sales have increased with a full half, something that will probably signify the start of the Chinese 'car vogue'. To give another example: every thirty days China spawns another city the size of Philadelphia and in spite of the SARS epidemic the Chinese demand for oil rose by ten percent last year (*NRC Handelsblad*, 2 January 2004). In order to prevent this country from growing into an economic superpower, the control of the oil supply in the Middle East is a matter of American national interest. This is exactly what Paul Wolfowitz, Deputy Minister of Defense, mid-2001 meant when he talked about 'area denial and anti-access strategies'.⁵³ Disclosed documents from the United States government have clearly established that this policy is not new either. Rather, *denial policy* was first articulated in 1949 under president Truman, and later perfected under Eisenhower (Telhami and Hill, 2002, 170-171).⁵⁴

A fourth, and probably the most important, motive for the United States not to neglect the Saudis is the unique position of Saudi Arabia as a 'swing producer', i.e. an oil country with quite some spare production capacity (IEA, 2004). Edward Morse speaks of it as the 'energy equivalent of nuclear weapons', which is somehow close to the truth.⁵⁵ This means that the world market—and the world's largest oil consumer in the first place—has a big interest in a cooperative Saudi government. The national spare capacity allows the Saudis to control the oil market to such an extent that they can fix serious disturbances. The United States, and the rest of the oil-consuming world, has depended for the past 20-25 years on the Saudi capacity to 'manage' the oil market in this way—and not only under 'extreme' circumstances like in the aftermath of the Islamic Revolution, during the Iraq-Iran war, during the second Gulf war and, again, during last year's war against Iraq. All in all, Saudi Arabia has acted in a commendable way for the past quarter of a century (and so have the other Gulf states for that matter)—although there may have been moments that some particular country felt pinched by the Saudis (like the Soviet Union in the 1980s and Venezuela in the late 1990s).⁵⁶ 'No one swings like the Saudis,' *The Economist* rightly states, and it is this that gives the Saudis all the aces in the energy game.⁵⁷ It is hardly imaginable that a serious disruption of the Saudi oil supply (and its attendant rise of oil prices) would be without consequences to the American market—even if the Americans would stop using Saudi oil altogether.

The four motives mentioned above show how the United States' position in regard to the world's largest 'swinging' oil exporter is constrained, but we should also consider the Saudi position in this constellation. Is, in turn, their interest not in accommodating the United States' government? To answer this, we need to re-examine the economic situation the country has been in for the past two decades and to relate this position to developments on the oil market.

Contrary to predictions, an oil shortage is nowhere near in sight.⁵⁸ There is, however, a shortage of *oil revenues*. Some oil-exporting countries lack sufficient means to finance further development of their production capacity—an urgently needed development on account for the anticipated rising

52 More in China, see Gvosdev, 2003-2004, 4.

53 'From the Editors,' in *Middle East Report*, Winter 2002, No. 225, p. 55.

54 Also, and more extensively, Telhami, 2002b.

55 Morse and Richard, 2002, 4. For a comparison of OPEC member states' spare production capacities, see appendix III, chart 1, in Obaid, 2000, 133.

56 Whether the Saudi motives are altruistic is subject of debate. See Al-Othman, 2002; Tahmassebi, 2002; Noreng, 2002, 193. In theory at least, Saudi Arabia is in a position to drive prices sufficiently low to compel other (OPEC and non-OPEC) producers to production restraint. The pros and cons of this 'flood-the-market' strategy are clearly spelled out by Obaid, 2000. For an alternative view, see Bromley, 2003, 31.

57 *The Economist*, 'Still Holding Customers Over a Barrel,' 23 October 2003, available from: <http://www1.columbia.edu/sec/bboard/gulf2000/gulf2000-29/msg01447.html> [accessed on 24 October 2003].

58 More on the debate between 'optimists' and 'pessimists', see Paul Roberts' recent *The End of Oil. On the Edge of a Perilous World* (New York: Houghton Mifflin, 2004).

demand for oil.⁵⁹ Although recent developments (i.e. higher oil prices) have had a positive effect on Saudi Arabia's present economic position, worries about the future are not out of sight (see section III.2 above). Cutting expenditures—to create money for the much-needed investments in the oil sector—is rather difficult because of the *kind* of expenditure the Saudi Arabian government has itself committed to. What makes the situation extremely problematic is that these outlays appear to be unchallengeable as decreasing them would mean incurring huge political costs.⁶⁰ What we are talking about here is the enormous public sector (in which through the years many Saudis have easily been able to find a job), the welfare state, the military expenditures, and the expenditures needed to support the royal family.

The conclusion is clear: 'The real crisis is not one of supply but of revenue, and it is the security of the producers themselves that has been eroded' (Kanovsky, 2003, 9). For sure, this is bound to increase their dependence on input from Western oil companies. The first proof of that has already been given: Early 2003, the Saudis awarded a consortium—led by Dutch/Shell Group and including Total and the national oil company Saudi Aramco—a 200,000-square-kilometer area in the remote Empty Quarter to explore for gas.⁶¹ The accord is the first to allow foreign companies to explore and produce gas since the industry was nationalized in the mid-1970s. Later, in the beginning of 2004, similar deals were made with China Petroleum & Chemical Corporation (Sinopec), Italy's Eni, Repsol of Spain; and Lukoil, the most internationally active of Russia's energy firms (*Middle East Economic Digest*, 5 March 2004; International Energy Agency, June 2004, 9-10). The companies are getting the kind of deal that non-OPEC countries normally offer but that has not been available with some big Gulf producers. The American companies were not yet part of the deal, but they will soon follow and take their share.

VI. It's Better to Deal with the Devil You Know...

In the past, the downfall of the House of Saud has been predicted countless number of times, but it never turned out to be more than a mere prediction. As we have witnessed recently, after an increasing number of terrorist attacks on Saudi targets (and even on *Saud* targets), predicting the fall of the Al Saud ones again has become a parlour sport. At the same time, several journalists, commentators, scientists and some politicians claim to see the end of the 'special relationship' between Saudi Arabia and the United States—or so they plea for in public. Their views are namely, although not solely, guided by the attacks of 'September 11' and the fall of the Saddam regime. It has been argued here that both assumptions are false: first, the House of Saud is more resilient than some would like to see; second, the United States is prepared to go to the upper most limits in order to preserve a good

59 Actually, not all experts agree on this point, but we can be sure of one thing: if there is a rise in demand this rise will have to be covered mainly by Middle Eastern countries. The non-OPEC countries will simply not have enough oil available for export in 10-20 years' time. The US Department of Energy and the International Energy Agency both project that global demand could grow from the current 77 mbd to 120 mbd in 20 years, driven by the United States and the emerging markets of South and East Asia. The agencies assume that most of the supply increase required must come from OPEC, whose production is expected to jump from 28 mbd in 1998 to 60 mbd in 2020. Virtually all of this increase would come from the Middle East, especially Saudi Arabia.

60 The most obvious solution, for example, would be to constrain military expenditure, which is feasible because of the recent developments in the region. However, this is harder than it seems because of the endemic corruption in military contracting. Kanovsky (2003, 7) specifies: 'Unofficial sources suggest that the 'commission' on military contracts runs from 5 per cent to 40 per cent on the contract [...] A British source [*Petroleum Economist*] quotes (unnamed) Middle East analysts who believe that \$10 billion disappear annually in 'kickbacks and skimming'. If these figures are reasonably accurate, they imply that in 1995-2000 about *one-fifth* of Saudi oil export revenues ended up in the private pockets of some corrupt members of the royal family and their associates' (italics P.A.). The major study on the more general aspects of a 'petrolised' state, economy and society, is Jahangir Amuzegar, *Managing the Oil Wealth. OPEC's Windfalls and Pitfalls* (London/New York: I.B. Tauris, 1999).

61 Stanley Reed, 'Suddenly, the Saudis Want To Play Ball,' *Business Week*, 4 August 2003. Although the deal does not include oil, the companies suspect that down the road they might be able to produce and sell any oil that they might find—now taboo in Saudi Arabia. Thus the upside gains could be huge. The gas deal is illustrative of the changing mood in Riyadh and that is the point I would like to make here. More on the sensitiveness of this issue, see Obaid, 2000, 53-60.

relationship with the Riyadh government. Thus, the main argument in this paper is that the first assumption is directly supported by the second one.

This is not to say that the Saudis—and therefore the Al Saud as well—are not in for trouble. The economic and security situations nurture plenty of worries, not to mention the possible problems concerning the succession of the throne. As the end of the line of the sons of Ibn Saud comes in sight, the path of leadership succession on to the grandsons remains unclear. Nevertheless, the Al Saud remains in control of plenty of ‘capital’—in the broad sense of the word⁶²—and it is therefore in the best interest of the United States to see that the current regime stays in power. Washington simply cannot afford to witness regime change in Riyadh (let alone contribute to it).⁶³ As recent history has shown, radical domestic political changes in oil-producing countries often lead to suppressed output, whether the change is an ‘anti-American’ direction (as in Iran) or a ‘pro-American’ one (as was the case after the collapse of communism in the Soviet Union) (Barnes, Jaffe and Morse, 2003-2004, 4). Substantially higher prices would be the inevitable consequence of that with the concomitant effects on the US (and the rest of the world’s) economy.⁶⁴

A different scenario—with no less deleterious effects—is also conceivable. Consider the possibility of a flood-the-market approach, which is not unimaginable under a radical Islamist regime that could impose on its people the hardships and privation of lower prices ‘[...] for the sake of a final victory over the enemies it deems unholy’ (Maugeri, 2003).⁶⁵ This would have a devastating effect not only on US oil production, but also negatively impact Russian oil production, endanger Caspian Basin prospects, and halt new exploration and technology development. ‘In short, within five to seven years, the world would be far more dependent on the Persian Gulf than it is today with no immediate way out—an outcome that would seem like a real victory for a radical [Islamist] regime (Maugeri, 2003).

Both scenarios will have negative effects for the US economy, which raises the question whether there is any practical alternative to the present Saudi regime that is really going to serve the interests of the United States. Washington’s conclusion looks obvious: It’s better to deal with the devil you know...

Despite ‘September 11’ and the rapid victory in Iraq, Riyadh and Washington are—at least, for the present time being—‘handcuffed’ to one another (Gause, 2003). The four pillars upon which the ‘special relationship’ is built—oil, security, Saudi Arabia as the moderate power in the Arab-Israeli conflict, and its prominent place within the Islamic world (favouring American interest in the region)⁶⁶—are in fact still intact with the exception of the last one, which to some extent appears to be

62 Which means that it is not only socio-economic capital that counts, but also religious, political, and symbolic capital. I took this from Ousmane Kane, *Muslim Modernity in Postcolonial Nigeria: A Study of the Society for the Removal of Innovation and Reinstatement of Tradition* (Leiden: Brill, 2003), with thanks to Joseph al-Agha, PhD student at ISIM in Leiden.

63 The nomination of the new American ambassador to Riyadh, Jim Oberwetter, is the most recent indication of the re-strengthening relationships that were somewhat strained after the September 11 attacks. Oberwetter belongs to President Bush’s Dallas friends and worked for Hunt Oil for the last 28 years. ‘Although Oberwetter has no diplomatic experience, foreign policy veterans and supporters in Dallas said he would make a good choice, in part because the Saudis—a key allies [sic] in a tumultuous region—put a premium on emissaries who have the president’s ear [...] The Saudi royal family prefers that US ambassadors be political appointees with close ties to the president, rather than career diplomats schooled in the complexities of the Middle East, analysts say.’ *The Dallas Morning News*, 17 November 2003, available from: <http://sunherald.com/mld/sunherald/news/politics/7286338.hnt?template=conte...> [accessed on 13 December 2003].

Nicholas Confessore confirms: ‘Oberwetter’s nomination tells the Saudis that it’s preservation of the status quo,’ *Los Angeles Times* (‘Big Words and Big Oil Don’t Mix’), 5 December 2003, available from: <http://www1.columbia.edu/sec/bboard/gulf2000/gulf2000-14/msg06842.html> [accessed on 23 December 2003].

64 For a recent estimate about this ([...] oil prices shoot up to \$100 per barrel’), see Afshin Molavi, ‘Islamists Won’t Blow Down the House of Saud’, *Slate*, 18 June 2004, available on: <http://slate.msn.com/toolbar.aspx?action=print&id=2102644> [accessed on 24 June 2004].

65 See note 56.

66 First and foremost, a reference has to be made here to the pro-American role Saudi Arabia played after the Islamic revolution took place in Iran. Secondly, the Saudi support in the fight against the Soviet occupation of Afghanistan. The

eroding as a consequence of '9/11'. Taken all together, one can therefore expect the Saudi-US relationship to assume a more 'normal' character—that is, to reduce the the visibility of the military component. Talk of divorce is premature. Recent events have changed perceptions and stirred up strong feelings—both in Saudi Arabia and the US—but without fundamentally changing the underlying realities. One might even surmise that the militants may be doing the Kingdom a favour. Thanks to the wave of terrorist attacks, the Al Saud have been shaken from their complacency and been given an oil windfall to boot. Saudi Arabia will probably weather this storm, beat back the terrorists and the royal system will muddle along, much for the benefit of the US.

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(Contd.) _____

pillars as mentioned above also reoccur, though in a different shape, in the excellent survey of Saudi-European relations that is given by Nonneman, 2001.

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