

# No Blood for Oil: Why Resource Wars Are Obsolete

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Is oil worth fighting for? For most observers, the answer might seem obvious. After all, there is no commodity more crucial to industrial age societies, and no national interest more vital, than access to oil at a stable price. Over the course of the coming decades, as supply shrinks while demand steadily grows, heightened competition over fading resources may lead to a whole new species of conflicts: resource wars, in which consumer countries fight each other to assure steady supplies of oil and other natural resources. Oil is like oxygen to industrial age societies, some of which may prove susceptible to desperate action in order to assure a steady supply. As Michael Klare has argued on behalf of the conventional wisdom, "that conflict over oil will erupt in the years ahead is almost a foregone conclusion."<sup>1</sup>

Fortunately, there is good reason to believe that resource wars will not be any more common in the coming century than they were in the last. There has never actually been a war over fossil fuels—the closest call was in 1973, when the Arab members of OPEC stopped selling oil to the United States and the Netherlands. Washington drew up plans to break the embargo by force and seize Arab oil. Secretary of State Henry Kissinger told *Business Week* that it was "one thing" to use oil as a weapon in the case of dispute over price, but it was quite "another where there is some actual strangulation of the industrialized world."<sup>2</sup> U.S. Secretary of Defense James Schlesinger apparently wrote to his British counterpart that the United States would not tolerate threats from "under-developed, under-populated" countries and that it was "no longer obvious" that the United States could not use force to resolve the stand-off.<sup>3</sup>

That is as dangerous as the situation was to get, however. Despite the contingency planning, using force never appears to have been a serious option to resolve the crisis. Kissinger repeatedly stated afterward that he determined military solutions to be "totally inappropriate" to the problem; the prospect of using military force to end the oil embargo died without serious debate.<sup>4</sup> In 1975 Congress

commissioned a feasibility study to explore the potential for a military seizure of the oil fields of the Gulf, in case the crisis should ever be repeated. The report concluded that such an action would be both practically and strategically unwise, for the fields would likely be damaged in any such operation, and assuring their long-term viability would probably prove costlier than any benefit that could be gained from their possession.<sup>5</sup>

Political scientist Robert Tucker was hardly alone when he noted with some amazement that the crisis was resolved in the absence of any meaningful threat of force. "Suddenly," he wrote, "we find ourselves in a strange universe," where 20th century Melians could withhold a vital product from the Athenians of the day.<sup>6</sup> The United States was not the only inhabitant of this bizarre world—Tucker noted in 1981 that the Soviets too had proven to be oddly cautious and tentative in their actions in the Gulf.<sup>7</sup> As it turns out, Moscow had come to the same conclusions as Washington about the feasibility of seizing Arab oil. Even though the Soviets had the obvious advantage of proximity and a massive imbalance in available forces in the region, they did not seem to ever have seriously considered making such a move.<sup>8</sup>

Military power played no role in the resolution of the 1973 crisis, nor did it factor into oil politics in any serious way during the Cold War. In fact, as a general rule force has not proved to be useful in oil politics. There has never been a war to control territory that contains fossil fuels, and there are good reasons to believe it is likely that there never will be. The conventional wisdom concerning the inevitability of energy wars is probably wrong.

## War for Oil?

At some point in the 21st century, the world will begin to run low on oil. Demand around the world is skyrocketing for the nonrenewable resource, far outpacing the growth of supply, and all projections suggest the pace will continue. While oil will not likely ever run out in the literal sense, geologists warn that in the not-so-distant future oil may well be a relatively scarce commodity.<sup>9</sup> Per capita energy use may hold steady or even decline across much of the industrialized world, but projected growth in population will more than compensate. In the U.S. Energy Information Agency's mid-range projection, even with higher prices world oil use will grow from 86 mbd in 2007 to 103 mbd in 2015 and 119 mbd by 2025.<sup>10</sup> Such growth would obviously require a major increase in the current production capacity of the industry. Few think that supply is likely to be able to keep pace. War need not result from such shortages, however. There are at least three good reasons to believe that war to control the territory that contains fossil fuels will continue to be a very rare phenomenon as the new century unfolds: First, fighting to control oil is likely to be a self-defeating proposition. It will always be cheaper to buy oil than to seize it. Second, the interests of consumers and producers do not conflict—all parties involved in oil production have serious interests in stability, without which no one can benefit. Finally, and perhaps

counter-intuitively, all kinds of warfare are becoming more and more rare. The 21st century is likely to be a great deal more stable than the 20th century, and oil politics should prove to be no exception.

### The Utility of Seizing Oil

A common refrain arising from the anti-war left is that the war in Iraq is being fought for oil. Perceptions across the region certainly back this up—large majorities of Arab publics are convinced that the United States is in Iraq merely to control the flow of its oil, and that it has no intention of leaving.<sup>11</sup> To these groups, one needs look no further to find the kind of resource war that so many scholars and analysts have long anticipated. Iraq provides the only proof they need. But if the oil was the main goal of the invasion, the United States certainly has acted rather strangely. Iraqi oil production has not met pre-war expectations, and it is hardly bringing riches to U.S. coffers. While Iraqi oil fields under-produce, U.S. troops participate in otherwise peripheral activities like pacifying Baghdad, battling al-Qaeda in Anbar province and building relationships between feuding Shi'ite clans. If the war was truly fought for oil, it has been an unqualified disaster. Indeed, if the United States had been primarily interested in Iraqi oil, it would have been far cheaper to simply buy it rather than go to war to seize it. Saddam Hussein would have been quite happy to sell as much of his oil as the world would have purchased, if only the United Nations sanctions were lifted. The cost incurred by the war—approaching one trillion dollars with no signs of slowing—far outweighs any possible benefit that could come from dominating the distribution of Iraqi oil. Oil companies stood to benefit from Saddam selling his oil just as much as they would if the United States had liberated it—after all, democracy is hardly a *sine qua non* for energy resource development. If the descendants of the Seven Sisters were indeed driving U.S. policy, the sanctions would be lifted and Saddam would now be selling his oil on the world market. The Iraqi experience demonstrates vividly what security analysts have known for a long time: War for control over oil reserves is usually a self-defeating proposition, since the cost involved in replacing the inevitable damage, and protecting the seized territory, outweighs the benefits that could be gained by conquest.<sup>12</sup> The infrastructure involved with oil exportation—from rigs to pipelines to tankers—is very fragile and costly to replace. Maintaining the flow from seized fields would present an additional problem, since that infrastructure is more easily sabotaged than protected. This seems to be especially true for offshore infrastructure, which is simultaneously more expensive and more vulnerable to attack. The fragility of petroleum infrastructure, therefore, provides powerful incentives for cooperative behavior. Oil rigs make easy targets.

There is good reason to believe that most states realize the limited utility of seizing oil fields. Even in those few areas where oil has been discovered under weakly held or disputed territory, the disputes have been resolved without even the realistic threat of force. If conflict breaks out, then no oil can get to market,

and no one benefits. As the old saying goes, money is a coward—investment dollars flee away from the slightest hint of instability, providing powerful incentives for cooperation over resource development issues. It is in the interest of all sides to continue to seek solutions to their disagreements at the bargaining table rather than on the field of battle.

The Caspian Sea provides a great example of low utility of military force in oil disputes. Early on, all states surrounding the sea (Russia, Azerbaijan, Iran, Turkmenistan and Kazakhstan) realized that two major issues had the potential to pit regional states against one another, and bring in outside states on behalf of their allies. First and foremost, pipelines had to be constructed to bring the oil to market. Because the Caspian has no outlet to the oceans, there is no easy way to get its resources to international buyers. In order for the Caspian to realize its potential, massive investment was needed to create or improve extraction equipment, such as rigs and platforms, and transportation equipment, such as pipelines and tankers. The question of who would provide that investment has sometimes pitted national against corporate interests. Analyses of potential pipeline routes tended to emphasize either their significance as instruments of external control over the destiny of the region, regarding profits as incidental, or their economic viability, treating politics only as a variable of risk.<sup>13</sup>

The second potentially explosive issue was the undefined legal status of the Caspian Sea.<sup>14</sup> The heart of the dispute is whether the Caspian, which is an entirely land-locked, salty body of water, is a sea or a lake. The distinction is important not only for geography buffs—if the Caspian is a sea, then according to international law, each riparian state can claim ownership of the seabed adjacent to its coast; if it is a lake, then its riches must be shared equally by all surrounding states. Unsurprisingly, the states with large oil and gas deposits close to their shores (Azerbaijan and Kazakhstan) believe that the Caspian is a sea. The states whose coastlines hold fewer deposits (Russia, Turkmenistan and Iran) have argued that the Caspian is a lake and therefore its resources should be shared equally among the five states. Each side constructed an argument based on various precedents in international law, some of which date back to agreements signed by the Soviets and the Iranians in 1921.

Little would be gained by repeating the intricacies of these issues, both of which have been addressed at length elsewhere. The important point for the purposes of this discussion is that, despite the fears of pessimists, neither of these issues has come close to sparking conflict. The states of the region, in conjunction with the energy companies, have reached a series of agreements on export routes, including the well-known pipeline from Baku to Ceyhan (BTC), which started carrying Caspian oil in mid-2006.<sup>15</sup> The littoral countries have also held a series of meetings on the legal status issue, the most recent of which was in Tehran in October 2007, and may well be close to reaching a lasting agreement. Russia has dropped its objections to considering the Caspian to be a sea, and Iran may well be close to doing the same. All sides seem to realize that the absence of a well-defined legal status of the Caspian Sea prevents maximum exploitation of

resources of the region. Many major agreements for exploration and production, which faced seemingly insurmountable problems only a decade ago, have been reached.<sup>16</sup>

The most important and obvious fact about Caspian geopolitics is this: no side has ever used force, or even threatened to use force, in order to bring about its preferred outcome in either the pipeline or legal status dispute. Despite the pessimistic predictions to the contrary, great power politics in the Caspian have evolved without a significant military component. The relative power of the actors has not mattered in any of the outcomes, perhaps because the utility of force is clearly minimal. The language that the players are using may resemble traditional *realpolitik*, but the issues over which they are arguing—and, much more importantly, the tools that they are using to pursue them—are entirely diplomatic and economic.<sup>17</sup>

The danger of conflict over either pipelines or the legal status issue is likely to shrink further as time goes on. Each year that goes by without the threat of war sets precedents for peaceful resolution of disagreements. Over the course of the coming decade, other agreements will likely emerge on how to bring oil to market, and construction may begin on new routes. Conflict over pipelines is highly unlikely now that BTC has set a cooperative precedent, and as time goes on it will become even less plausible. The risk of conflict is surely highest before the cement of agreement on the steel umbilical cords dries. Martha Brill Olcott, arguably the leading American expert on the region, wrote that:

It certainly seems predictable that the level of Western interest in the region will diminish once the Caspian export routes are firmed up and the construction of pipelines begun . . . Once pipelines are built and production begins, the focus on the region is likely to shift to potential new areas of energy exploration. There will of course be interest in maintaining the flow of oil, but relations will move to a 'maintenance' phase.<sup>18</sup>

This "maintenance phase" is unlikely to be as contentious as the initial negotiations, which, though sometimes spirited, are by no means explosive. In oil politics, these phases rarely are.

### Common Interest

Today oil is traded on a global market—supply disruptions anywhere affect the price everywhere. It is of course the price of oil that is most clearly correlated with economic performance in consumer and producer states alike. Although their interests diverge on precisely what that price should be—producers want it to be relatively high, and consumers relatively low—they both want to see it remain fairly stable. Any war in a resource-rich area that would disrupt the supply and raise the price would prove to be counterproductive. A certain amount of predictability is necessary to assure that disruptions in price, the kind that have far-reaching implications for an entire economy, do not occur. In order for any

energy company to be interested in developing the resources of this region, jurisdictional issues must be settled. As long as higher risks mean higher costs, the perception of instability will remain an important factor driving potential investors away from energy resource development.<sup>19</sup> No state is able to benefit from oil and gas fields until ownership issues are settled.

Oil does no one any good in the ground. In order for any country to profit from owning large stocks, it must sell. Control over the territory that contains oil is therefore hardly necessary to assure access to its resources. Whoever controls the territory where oil is extracted will face the same incentives to sell it on the world market. States of the 21st century may well reach the conclusion that it does not much matter who controls oil, as long as those who do seem willing to sell it.

No matter who is in charge of Saudi Arabia, or Kuwait, or the UAE, for example, there is every reason to believe that they will have strong incentives to sell their oil to the industrialized consumer states. In one of the very few studies of the issue, political scientist Shibley Telhami found that "a change in regime from moderate to radical in one state does not appear to alter the pattern of that state's foreign trade."<sup>20</sup> Throughout the Cold War, the nature of Gulf regimes had little or no impact on who they traded with, or how much. In other words, market forces have a greater impact than national policy in determining the flow of oil. Even the 1980–88 Iran–Iraq war failed to have much of an impact on oil production, despite the fact that much of the fighting occurred within artillery range of major oil terminals and facilities.<sup>21</sup>

Even if profoundly unfriendly regimes were to come to power in the Persian Gulf or in any other oil-producing region, they would still need to sell their oil. Any government determined to act with profound economic irrationality would be quickly displaced by those eager to maximize the amount of oil revenue coming into their country. Also, unlike in 1973 when boycotts could target individual countries, today the oil companies control distribution and will make adjustments to keep their customers satisfied and protect their profits. The market will bring stability, perhaps better than that currently provided by the over-strapped U.S. taxpayer.<sup>22</sup>

Oil-producing countries have an interest in keeping the price high; consumer states wish to see it low. Both, however, want it to keep flowing. Instability in oil-producing regions prevents that from happening. The fact that there no one on either side has an interest in seeing the spigot turned off provides powerful, stabilizing incentives encouraging the peaceful development of these resources.

### War Is Rare, and Getting Rarer

International precedents for oil exploitation certainly suggest that future resource competition issues could be settled peacefully. In fact, war has never broken out over the ownership of oil deposits, even when that ownership was hotly contested. There are a few rather significant, disputed fields that have been discovered in the past few decades, from the North Sea to the Gulf of Mexico to

the Caspian Sea.<sup>23</sup> In all cases, agreements have been reached to develop the oil and gas fields without conflict. Of course peaceful precedents do not guarantee peaceful futures—Norway and the United Kingdom are obviously quite different from China and Taiwan—but still it is worth noting that when vast offshore hydrocarbon fields have been discovered before, despite the energy autarky and billions of dollars at stake, lasting agreements have emerged that benefit all parties. Despite the fact that the strategic and economic importance of oil grew steadily throughout the past century, there has never been a time when states have determined that assuring access to petroleum was worth the risk of war.

The final and perhaps most important reason to not expect a rise in resource wars in the next century is due to what may be the most under-reported—and perhaps counter-intuitive—phenomenon in international politics: War is disappearing from the planet. A number of both academics and practitioners, from Richard Nixon to John Mueller, have argued for years that due to a combination of nuclear weapons, economic interdependence, institutions and the evolution in ideas, major war has become all but obsolete.<sup>24</sup> “Apart from an occasional Cod War,” argued Samuel Huntington, wars in the industrialized north are “virtually unthinkable.”<sup>25</sup> If it is true that war is obsolete for the strongest of powers—and a growing number of experts believe that it is—then the weakest can reasonably hope that it will soon be for them too, as their societies and economies develop, and as they adopt the institutions, technology and ideas of the industrialized world.<sup>26</sup> As a result of something akin to a trickle-down effect for peace, conflict may well wane everywhere as the post-Cold War era unfolds. This utopian future seems to be unfolding, if the data on global warfare can be believed. Figure 5.1 outlines what may turn out to be one of the more astonishing developments in human history: the decline of war as an instrument of policy.

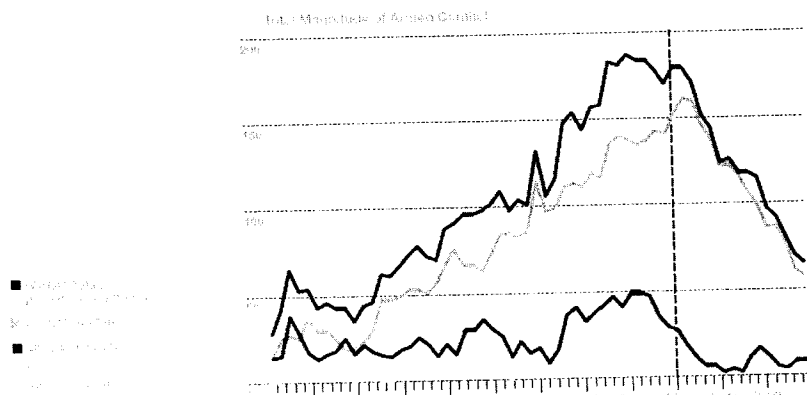


Figure 5.1 Trends in Armed Conflict, 1946–2005

Source: Center for International Development and Conflict Management, University of Maryland, College Park

Major wars tend to be quite memorable, so there is little need to demonstrate that there has been no such conflict since the end of the Cold War. But the data seem to support the trickle-down theory of stability as well. Every extant empirical analysis of warfare has found that the frequency and intensity of *all types* of wars—interstate, civil, ethnic, revolutionary, etc.—declined throughout the 1990s and into the new century, after a brief surge of postcolonial conflicts in the first few years after the collapse of the Soviet Union.<sup>27</sup> The magnitude and intensity of warfare is steadily declining. At the end of 2007, Africa is more peaceful than it has ever been (despite its other problems); Europe, South America, and most of Asia are the same. Although no one seems to have noticed, warfare—whether over resources or anything else—is disappearing from the Earth.

For resource wars to become a reality, not only would substantial economic incentives for peace and the common interest of consumers and producers have to be overcome, but also international trends of peaceful conflict resolution would have to be reversed. If indeed conflict is becoming a rare event, then the risk of war over oil in the coming century is even lower than it would have been otherwise. And that risk was probably never particularly high.

### The China Wildcard

One of the truly significant moments in the history of international politics took place in late 1993. The exact date it occurred is unclear, since at the time no one seemed to take much notice. There were no headlines, no news coverage, no analysis from CNN pundits, not even hyperbolic warnings from Congress. Looking back, it seems remarkable that no one in 1993 took note of the moment that the People's Republic of China (PRC) became a net importer of oil.<sup>28</sup> Few events were to have as much lasting importance for economics, politics, and national security affairs, for the transition to oil importer status was an early symptom of the rapid growth that the Chinese economy was to experience over the next decade (and counting).<sup>29</sup> The effects on the price at the pump are clear, the implications for international politics significantly less so.

Traditional realist analysis would suggest that the growing economic power of China will inevitably be turned into military power which, when coupled with its new thirst for oil, will lead to expansion, and perhaps even to conflict with the United States. According to this litany of pessimistic projections, China will seek to maximize its power and influence throughout the next century, and will do so by military means whenever necessary.<sup>30</sup> The rise of China may be accompanied by balancing, suspicion, security dilemmas and instability. The oil supplies of the region just add to its problems, inspiring self-interested littoral states to vie for their control.

Will China's growing thirst for oil bring it into conflict with the United States as the century unfolds? All projections suggest that both India and China will need more and more oil to fuel their booming economies. Nightmare scenarios have the Chinese presence in the Persian Gulf and other resource-rich areas growing,

igniting competition and perhaps even conflict with the other consumer states. However, as is the case everywhere in petroleum politics, consumer states' interests align far more than they conflict. During the mercantilist era, states would commonly attempt to control territory and keep vital resources out of the hands of their potential enemies; today, they trade with one another to get what they want. All consumer states want to see oil be cheap. In any disagreement over oil, it is more likely that the United States and China would find themselves on the same side rather than opposing one another. A Chinese challenge to the status quo in the Pacific would entail an enormous risk for a questionable reward, which is a calculation that Beijing seems to have made.<sup>31</sup> In the East China Sea, China and Japan have taken active steps to begin developing what has been called a conflict avoidance regime to address their many overlapping claims, from fishing rights, scientific research notifications, and ultimately for military and intelligence activities.<sup>32</sup> Since 9/11, the Chinese relationships with both the United States and ASEAN have improved dramatically, leading to the signing of a code of conduct for parties in the various South China Sea disputes.<sup>33</sup> Regional trends suggest that risk of war seems to be decreasing as time goes by. Alistair Iain Johnston, one of the most important living China scholars, is not alone in believing that fears of a rising dragon are misplaced, and that China exhibits all the signs of being a status quo power.<sup>34</sup> The idea that oil is not worth fighting for may have taken hold in the Pacific Rim.

The first decade-and-a-half of post-Cold War international relations in the Pacific have not unfolded as early pessimist forecasts predicted. In fact, the states of the region have acted almost as if they were unaware of the inevitability of rivalry. No alarms seem to have been rung in response to the growth of China. The post-Cold War period has been marked by a notable (and, to realists, puzzling) lack of balancing behavior in East Asia.<sup>35</sup> Today both the evidence and theoretical logic support the belief that major war to assert control over the potentially vast petroleum deposits in the South and East China Seas, despite lingering disputes over their ownership and rapidly increasing regional demand, is not very likely in the indefinite future. If indeed the use of force to assure access to oil is not a realistic option even between China and the other East Asian states over the potential riches of the East and South China Seas, then can it be an option anywhere?

### Conclusion

Overall, there seems to be little reason to believe that the world is on the verge of a series of resource wars that will define the new era. Although the demand for oil will be growing steadily, market forces are likely to determine how it is distributed; the interests of consumers and producers are likely to align far more than they conflict; and the overall trends in warfare will also likely affect decisions regarding oil politics. In other words, there is much room for optimism. Despite common perceptions to the contrary, the world is a far safer place than it was in the 20th century. We are living in a golden age of international security,

where war is rare and major war is non-existent. While international rivalries and disagreements will never go away, the odds are good that their solutions will be peaceful. If states prove unwilling to fight over control of the most vital of national resources, will they ever again come to blows?

### Notes

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2. Quoted in James M. Collins and Clyde R. Mark, *Oil Fields as Military Objectives: A Feasibility Study* (Washington, DC: Government Printing Office, August 12, 1975), 79. Kissinger mentions in his memoirs that he requested a variety of contingency plans to be drawn up to address the crisis. *Years of Upheaval* (Boston: Little Brown, 1982), 871.
3. Glenn Frankel, "U.S. Mulls Seizing Oil Fields in '73: British Memo Cites Notion of Sending Airborne to Mideast," *Washington Post*, January 1, 2004, A1.
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5. Collins and Mark, *Oil Fields as Military Objectives*.
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13. For an example of the former, see Svante Cornell, "Geopolitics and Strategic Alignments in the Caucasus and Central Asia," *Journal of International Affairs*, 4, no. 2 (June–August 1999): 100–125. For the latter, Robert Ebel and Rajan Menon, eds., *Energy and Conflict in Central Asia and the Caucasus* (New York: Rowman and Littlefield Publishers, 2000).
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  20. Shibley Telhami, *Power and Leadership in International Bargaining: The Path to the Camp David Accords* (New York: Columbia University Press, 1990), 72-73.
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  22. For a good, if a bit dated, discussion of the power of market forces in the oil industry, see Philip K. Verleger, Jr., *Adjusting to Volatile Energy Prices* (Washington, DC: Institute for International Economics, 1993).
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  26. Mueller elaborates upon and supports this point in *The Remnants of War* (Ithaca, NY: Cornell University Press, 2004).
  27. See Ted Robert Gurr and Monty G. Marshall, *Peace and Conflict 2005: A Global Survey of Armed Conflicts, Self-Determination Movements, and Democracy* (College Park, MD: Center for International Development and Conflict Management, 2005); Human Security Centre, *Human Security Report 2005* (New York: Oxford University Press, 2005); Peter Wallensteen, and Margareta Sollenberg, "Armed Conflict, 1989-99," *Journal of Peace Research*, 37, no. 5 (2000): 625-649; and Ted Robert Gurr, "Ethnic Warfare on the Wane," *Foreign Affairs*, 79, no. 3 (May/June 2000): 52-64.
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  29. For other early, pessimistic forecasts, see Kent E. Calder, "Asia's Empty Gas Tank," *Foreign Affairs*, 75, no. 2 (March/April 1996): 55-69; and Robert A. Manning, "The Asian Energy Predicament," *Survival*, 42, no. 3 (Spring 2000): 73-88.

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33. See Yann-Huei Song, "The Overall Situation in the South China Sea in the New Millennium: Before and After the September 11 Terrorist Attacks," *Ocean Development and International Law*, 34, nos. 1-2 (July-December 2003): 229-277; and Nguyen Hong Thao, "The 2002 Declaration on the Conduct of Parties in the South China Sea: A Note," *Ocean Development and International Law*, 34, nos. 1-2 (July-December 2003): 279-285.
34. Alastair Iain Johnston, "Is China a Status Quo Power?" *International Security*, 27, no. 4 (Spring 2003): 5-56.
35. Daniel Kang makes this point very convincingly in "Getting Asia Wrong: The Need for New Analytical Frameworks," *International Security*, 27, no. 4 (Spring 2003): 57-85.