

The Other Threat to Oil Supplies: Shiite Tensions in Saudi Arabia and Bahrain

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Brief Analysis

Violence in eastern Saudi Arabia and continuing tension in Bahrain are reminders that Gulf oil exports face other threats besides potential Iranian closure of the Strait of Hormuz.

Over the past ten days, armed clashes have erupted between security forces and protestors along Saudi Arabia's Persian Gulf coast, the home of its minority Shiite population as well as huge oil fields and associated export infrastructure. The trouble began after the arrest of Shiite cleric Nimr al-Nimr, who had publicly welcomed the recent death of Crown Prince Nayef. During Nayef's tenure as interior minister, local Shiites had blamed him for their oppression.

Two Shiites died in protests following Nimr's arrest, which took place just a few miles from Ras Tanura, the world's largest oil export terminal, and Abqaiq, the world's largest oil processing facility. The oil facilities themselves have yet to be targeted by Shiites but are considered very vulnerable. In further incidents, a Shiite gunman was killed during a July 13 attack on a police station, and four Saudi policemen were wounded in a separate attack when their patrol came under fire. The next evening, Molotov cocktails were thrown into the parking lot of a local courthouse. A group of thirty-seven Shiite clerics has issued a joint statement urging local youths to "steer away from violence," so tensions could ease in the coming days.

The simmering trouble in Saudi Arabia has been linked to continuing tensions on the nearby island of Bahrain. Though not a major oil producer, Bahrain is considered vital to U.S. interests because it hosts the headquarters of the Fifth Fleet. In 2011, Saudi forces intervened when elements of the majority Shiite population rioted against the Sunni al-Khalifa royal family. Last Monday, Bahraini interior minister Sheikh Rashid bin Abdullah al-Khalifa held talks with his Saudi counterpart Prince Ahmed bin Abdulaziz al-Saud, during which he stated that the island would "confront anyone trying to divide the ranks of the people." The two men also discussed developments in "detecting

dens of terrorism in Bahrain." Unmentioned by name was Iran, but there is little doubt that both men regard the Islamic Republic as the controlling force behind recent incidents.

Parallel to the clashes in the streets is a battle of narratives. Although the Bahraini opposition held a near monopoly on public propaganda for months, the government now has an active public relations system to make sure that the official view of incidents is distributed rapidly. Similarly, Riyadh released photos this weekend of Eastern Province governor Prince Muhammad bin Fahd and Assistant Interior Minister Prince Muhammad bin Nayef visiting injured policemen in the hospital.

The public-relations battle is escalating internationally as well. To Riyadh's fury, the Russian Foreign Ministry has condemned Nimr's arrest. And the *Sunday Times* of London reported yesterday that activists were trying to stop Prince Nasser bin Hamad al-Khalifa, the head of Bahrain's royal guard and Olympic committee, from attending the Summer Games because of allegations he has been involved in torture. Meanwhile Nasser's half-brother -- Crown Prince Salman bin Hamad, a noted liberal -- has been in Washington, where the Obama administration is considering the appropriate balance between renewed arms deals and more muted criticism of the Bahraini government on the one hand, and advocacy for more political reforms on the other.

Recently, oil began to flow via a pipeline in the neighboring United Arab Emirates, allowing exporters to avoid the Strait of Hormuz chokepoint off Iran's coast. For its part, Riyadh has modified another pipeline for the same purpose. Together, the new pipelines mean that 6.5 million barrels of oil per day can bypass the strait, through which 17 million b/d are currently shipped. Given the tensions in Saudi Arabia and Bahrain, the pipeline news will likely be a boon to global oil markets and the region's customers in Asia. But inciting the local populations is surely an attractive tactic for Tehran as it responds to sanctions on its own oil exports. So long as the political frustrations of Shiites in the two kingdoms remain conducive to exploitation by extremists, uncertainty will persist about the security of energy supplies. Washington should encourage Riyadh and Manama to make the reforms necessary to avoid this.

Simon Henderson is the Baker fellow and director of the Gulf and Energy Policy Program at The Washington Institute. ❖

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